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ABSTRACT

To develop a competency-based curriculum guide for merchandising/marketing for the University of Hawaii Community College System, a project (1) reviewed and developed a list of all occupations in the general merchandising/marketing program area, (2) developed task inventories for selected occupations, (3) drew a worker mobility chart to show the basic hierarchy of occupations in the program area, and (4) developed competency-based instructional materials. (The curriculum guide is available separately as CE 024 405.) The program advisory committee reviewed the occupations and selected three major clusters for which task inventories were developed: stock/receiving/shipping, display/buying/sales, and supervisory/management. Employers and employees surveyed by means of a background information sheet and the task inventories indicated tasks performed and time spent on each task. Findings indicated that the task list identified tasks performed by experienced workers, while the occupations selected in the general merchandising/marketing program area were primarily entry-level positions. The percentage of associate degree holders in each of the occupational clusters was small, indicating a need to determine why community college graduates are not employed in their vocational areas. (Appendixes, amounting to approximately one-half of the report, include the survey instruments.) (YLB)

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Final Report

Project No. 498AH70041
Grant No. G007701872

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COMPETENCY-BASED EDUCATION CURRICULUM GUIDE FOR MERCHANDISING/MARKETING

May 1979

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EDUCATION & WELFARE
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Office of Education

Vocational Education Research Program

AUTHOR'S ABSTRACT

The purpose of this project is to develop a Competency-Based Education Curriculum Guide for Mechandising/Marketing for the University of Hawaii Community College System. The project will: (1) Review and develop a list of all occupations in the General Merchandising/Marketing program area, (2) Develop task inventories for selected occupations, (3) Draw a worker mobility chart to show the basic hierarchy of occupations in the General Merchandising/Marketing program area, (4) Develop competency-based instructional modules, and (5) Develop the Curriculum Guide in Merchandising/Marketing based on a competency-based model.

A General Merchandising/Marketing program advisory committee will be formed to discuss the overall organization of the project and to get input on the overall curriculum design. The college and the program advisory committee will decide which occupations training will be offered. Based on this input the project director and faculty members will do a task inventory on these selected occupations, write job descriptions and competency levels, prepare instructional modules, conduct systemwide workshops, and develop and publish a curriculum guide.

The results of this survey identify the tasks that are essential for employment in the occupations selected by the program advisory committee and the college.

From the survey findings it was concluded that the task list constructed identify those tasks which are performed by experienced workers in the merchandising/marketing program area, and the occupations selected by the program advisory committee and college were primarily entry-level positions.

Final Report

Project No. 498AH70041
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COMPETENCY-BASED EDUCATION CURRICULUM GUIDE FOR MERCHANDISING/MARKETING

David T. Nakamaejo
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Kapiolani Community College

Honolulu, Hawaii

May 1979

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Vocational Education Research Program

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INTRODUCTION

THE PROBLEM

A review of the Hawaii Occupation Demand and Supply Projections studies conducted by the Office of the Hawaii State Director of Vocational Education shows that numerous merchandising/marketing job opportunities seem available. Employment level projection by 1982 indicates a need for 37,099 workers.[1] The supply of projected graduates will not meet the demand projections. In addition FY 1975 Community College Survey of graduates indicates that only a little more than half of the working graduates were in jobs related to their studies in the merchandising/marketing field.

In July, 1975, a program review was conducted on the Merchandising Mid-Management program by the Business Education faculty of Kapiolani Community College. The review pointed out concerns on program completion rate, non-completers of program employed in the field, the need for intensive short-term training programs, and the need for curriculum modifications for career laddering within the program. The review recommended the use of the task analysis model used by the Vocational Education Exemplary Project to develop a "Curriculum Guide for Hospitality Education" so that long-range planning can follow.[2]

OBJECTIVES

The objectives of this project were to:

1. Develop a Curriculum Guide for Merchandising/Marketing based on a competency-based curriculum.
2. Develop some instructional modules for curriculums.
3. Maintain ongoing contact with industry on manpower and job market demands.
4. Make the Guide available to all seven community colleges in the University of Hawaii System.
5. Share the Guide with other colleges in Mainland U.S. and in the Pacific Basin area.

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[1] Occupation Employment Projections for Vocational Education Programs, State of Hawaii, 1977-1982, Office of the State Director for Vocational Education, University of Hawaii.

[2] Kalani, Henry, Curriculum Guide for Hospitality Education, Vocational Education Exemplary Project, Kapiolani Community College, University of Hawaii, 1976.

METHODOLOGY

MERCHANDISING/MARKETING PROGRAM ADVISORY COMMITTEE

A General Merchandising/Marketing program advisory committee was formed to discuss and advise on the overall organization and direction of the project. The members of the committee were composed of representatives from the retail/merchandising industry, the manufacturing/distribution/wholesaling industry, the mass media, business educators from the high schools and community colleges, and a curriculum specialist.

The advisory committee reviewed a list of all occupations (see Appendix A) in the General Merchandising/Marketing program area and selected occupations which Kapiolani Community College should provide training for.

The occupations selected by the committee were categorized into three major occupational clusters. The major clusters were: (1) stock/receiving/shipping, (2) display/buying/sales, and (3) supervisory/management positions. (See Table 1.)

DEVELOPMENT OF TASK INVENTORY

Task inventories were developed from the list of selected occupations made by the program advisory committee. The task list was a comprehensive list of statements which defined single units of work that is performed by a worker in a specific occupation.

The faculty members in the Business Education Merchandising Department reviewed the first draft of the task list to identify incorrect language and to add any tasks that may have been omitted. Appropriate changes and additions were then made for the second draft of the task list. The program advisory committee and a small sample of workers in the occupations reviewed and edited the second draft. The reedited list was used to develop the survey instrument to sample workers (60-100) employed in the selected occupations.

A separate task inventory was developed for each of the three major categories. (See Table 2 for task inventories.)

ACQUISITION OF DATA

Identifying the Population and Selecting the Sample

Employers and employees in the General Merchandising/Marketing program area constituted the population the task inventory survey was directed. The population was divided into three major groups: (1) wholesale trade, (2) general merchandising, and (3) apparel and accessory. The criteria for identifying the population was based upon the description of the industry provided by the U.S. Department of Labor,

TABLE 1

SELECTED OCCUPATIONS KAPIOLANI COMMUNITY COLLEGE SHOULD PROVIDE TRAINING FOR

Stock/Receiving/Shipping Cluster

Stock Clerk
Receiving Clerk
Shipping Clerk
Warehouse Clerk
Traffic Clerk

Display/Buying/Sales Cluster

Merchandise Displayer
Display Person
Display Trimmer
Buyer
Assistant Buyer
Buyer's Clerical
Salesperson

Supervisory/Management Cluster

Distribution Wholesale Manager
Assistant Distribution Wholesale Manager
Merchandise Manager
Assistant Merchandise Manager
Department Manager
Assistant Department Manager
Floor Supervisor
Section Supervisor

TABLE 2-1

REVISED STOCK/RECEIVING/SHIPPING CLERK TASK INVENTORY

A. PREPARING MERCHANDISE FOR SHIPMENT

1. Obtain shipping order from sales department
2. Write shipping invoice
3. Verify shipping authorization signatures
4. Assign warehouse personnel to collect merchandise
5. Count and sort merchandise
6. Check packing of merchandise
7. Assemble packing cases
8. Write address labels
9. Weigh packed cases
10. Prepare shipping documents
11. Fill in all parts of shipping forms
12. Include packing slip with shipment
13. Order trucks
14. Load trucks
15. Spot merchandise for loading by driver
16. Supervise loading of trucks
17. Enter seal number in log and driver's record
18. Verify time-in on driver's record
19. Verify time-out on driver's record
20. Box or package each order

B. DETERMINE CARRIER

1. Select carrier by number of cases to be shipped
2. Select carrier by weight of shipment

B. DETERMINE CARRIER (continued)

3. Select carrier by material to be shipped
4. Select carrier by bulk volume of shipment
5. Select carrier by value of shipment
6. Select carrier by nature of shipment, e.g., perishable
7. Select carrier by geographical direction
8. Select carrier by reputation of carrier

C. SHIPPING DOCUMENTS/PROCESS DOCUMENTS

1. Write bills of lading
2. Enter shipment in parcel post log
3. Affix postage to cartons
4. Enter shipment in UPS log
5. File bill of lading copy
6. File invoice copy
7. Log documents in outgoing shipment log
8. Sign and date invoice as shipped
9. Route invoice and B. O. L. to proper office

D. RECEIVING MERCHANDISE

1. Verify delivery address
2. Remove seals from trucks if attached
3. Check for damaged cases
4. Refuse delivery if warranted
5. Write damage report if necessary
6. Locate packing slip
7. Verify packing slip against Purchase Order
8. Verify number of cases against bill of lading

D. RECEIVING MERCHANDISE (continued)

9. Record any visible damage
10. Obtain driver's signature for discrepancies
11. Note and record shortages
12. Sign bill of lading
13. Sign delivery record
14. Inspect contents of cases against packing slip
15. Count contents of cases against packing slip
16. Stamp, sign, date Purchase Order
17. Write detailed receiving slip if no Purchase Order
18. Distribute merchandise to proper wholesale location
19. File Purchase Order warehouse copy
20. File packing slip copy
21. Route signed, stamped, dated Purchase Order to proper office
22. Log receiving documents in incoming shipment log

E. STORING MERCHANDISE/INVENTORY CONTROL

1. Operate lift truck for storing heavy parts
2. Use hand truck for moving cartons
3. Identify storing method by alphabet
4. Identify storing method by number
5. Place merchandise on shelves in proper sequence according to system in use
6. Take oversupply to warehouse
7. Remove merchandise from cartons
8. Place combustibles in proper containers
9. Keep aisles clear of hazards
10. Sweep floors

E. STORING MERCHANDISE/INVENTORY CONTROL (continued)

11. Enter item on inventory control card
12. Add quantity to previous balance
13. Count stock
14. Check actual count against control card
15. Compile complete inventory count
16. Deduct items sold from sales invoice

F. FILLING SALES ORDERS AND SHOP ORDERS

1. Verify item number to item
2. Select item ordered from shelf
3. Enter amount selected on sales invoice
4. Place compiled order in proper place
5. Enter amount delivered on shop order
6. Obtain signature for receipt of items
7. Post items to inventory cards

TABLE 2-2

REVISED DISPLAY/BUYING/SALES PERSON TASK INVENTORY

A. PLANNING OF DISPLAYS

1. Analyze customer traffic patterns
2. Determine merchandise layouts
3. Decide on types of merchandising fixtures required
4. Decide on types of displays needed
5. Plan for seasonal displays
6. Determine need for merchandise displays
7. Decide on tie-in items for displays
8. Determine space required for seasonal displays
9. Select location for seasonal displays
10. Select location of impulse displays
11. Originate display ideas
12. Select location for new items
13. Coordinate display with other forms of promotion

B. CONSTRUCTION OF DISPLAYS

1. Group related merchandise
2. Set-up major displays
3. Supervise setting up of displays
4. Supervise setting up of seasonal merchandise displays
5. Construct props using handtools
6. Arrange props
7. Arrange mannequins to display merchandise
8. Arrange furniture to display merchandise
9. Arrange backdrops to display merchandise

B. CONSTRUCTION OF DISPLAYS (continued)

10. Assemble prefabricated display properties from wood using handtools
11. Assemble prefabricated display properties from fabrics using handtools
12. Assemble prefabricated display properties from glass using handtools
13. Assemble prefabricated display properties from paper using handtools
14. Assemble prefabricated display properties from plastic using handtools
15. Place price signs in displays
16. Place descriptive signs in displays
17. Phase out seasonal displays
18. Dismantle old displays
19. Letter show cards for displays

C. MAINTAINING OF DISPLAY

1. Supervise straightening of merchandise
2. Post signs
3. Maintain shelf layout
4. Maintain shelf/rack alignment
5. Rotate stock
6. Effectively use point-of-sale material supplied by the manufacturer

D. ORDERING MERCHANDISE

1. Select and order merchandise offered by manufacturer's representatives
2. Forecast seasonal merchandise needs
3. Review past sales records

D. ORDERING MERCHANDISE (continued)

4. Place orders with source
5. Write promotional orders
6. Select items, lines to be stocked
7. Determine basic stock levels
8. Authorize payments to suppliers and vendors
9. Conduct staff meeting with sales personnel to introduce new merchandise

E. PRICING

1. Maintain current price book
2. Make required price changes
3. Enter price changes in book
4. Supervise price marking
5. Check merchandise for accurate pricing
6. Keep price changes current
7. Give information to markers on price markups to print on price tickets
8. Give information to markers on price markdowns to print on price tickets
9. Give information to markers on manufacturer number, season code, and style number

F. MAINTAINING STOCK

1. Maintain proper stock to sales ratio
2. Maintain balance stock assortments
3. Return damaged merchandise for credit
4. Analyze overstocks
5. Clear out excess overstocks
6. Analyze understock conditions

F. MAINTAINING STOCK (continued)

7. Maintain stockroom inventory level
8. Clear out discontinued merchandise
9. Maintain accurate shelf price tags
10. Correct mispriced merchandise
11. Allocate merchandise to branch store
12. Verify quantity of incoming merchandise against invoice
13. Verify quality of stock received
14. Inspect exchanged or refunded merchandise
15. Liquidate outdated merchandise
16. Liquidate damaged merchandise
17. Liquidate unsold seasonal merchandise
18. Determine stocking schedule
19. Determine required manhours to stock
20. Schedule floor stocking
21. Insure correct stocking methods are used
22. Supervise stocking
23. Clean and dust merchandise
24. Clean and dust fixtures holding merchandise
25. Report damaged merchandise fixtures

G. SALESMANSHIP/MECHANICS OF SALE

1. Acknowledge potential customer
2. Ask questions of customer to determine needs
3. Take customer to location of wanted merchandise
4. Select merchandise from various price lines to allow customer choice
5. Describe benefits of merchandise to customer

G. SALESMANSHIP/MECHANICS OF SALE (continued)

6. Put merchandise in customer's hands
7. Suggest additional merchandise to increase amount of sale
8. Package merchandise for customer
9. Thank customer by name
10. Compliment customer on selection of merchandise
11. Suggest alternate places to purchase merchandise not carried by your store
12. Read prices on merchandise
13. Read classifying information from price tickets
14. Ring cash register
15. Count money taken from customer
16. Count money returned to customer
17. Add and subtract numbers
18. Compute percentages
19. Follow company policy on purchases by check and credit card(s)

H. PRODUCT KNOWLEDGE

1. Look at merchandise you are selling
2. Hold and feel merchandise to determine quality and amount of workmanship
3. Examine merchandise for quality and amount of workmanship
4. Read tags and labels for manufacturer's name
5. Read tags and labels for care of merchandise
6. Make comparisons with other merchandise
7. Determine what merchandise has to offer
8. Demonstrate uses of merchandise
9. Interpret the features of a product in terms of benefits to the customer

H. PRODUCT KNOWLEDGE (continued)

10. Analyze products in relation to current trends (such as fashion, style, innovations)
11. Explain service guarantees to customers
12. Explain warrantees to customers
13. Interpret directions for customers

I. CLOSING PROCEDURES/CUSTOMER RETURNS

1. Gather price tickets from the day's business
2. Gather saleschecks from the day's business
3. Count receipts for day
4. Prepare deposit of day's receipts
5. Follow store procedures for closing registers
6. Follow store policy for returns
7. Treat customer with return courteously
8. Examine returned merchandise for damage
9. Suggest alternate merchandise to customer
10. Repair damaged merchandise for customer when possible
11. Determine the amount to be credited on return
12. Return damaged merchandise to manufacturer when defective

J. CUSTOMER SERVICE

1. Establish book of customer names and addresses
2. Call customers about special sales
3. Call customers about arrival of new merchandise
4. Compile list of store customer services
5. Verify location of merchandise in your store
6. Consult newspapers for advertised items in your store and competitors
7. Suggest opening a store charge account when applicable

TABLE 2-3

REVISED SUPERVISOR/MANAGEMENT TASK INVENTORY

A. ADVERTISING

1. Review weekly advertising schedule
2. Inform section people of ad merchandise required
3. Determine quantities of ad merchandise required
4. Supervise ordering of ad merchandise
5. Decide types of ad displays to be built
6. Coordinate location of ad displays
7. Supervise building of ad displays
8. Determine store signs needed
9. Order store signs for ad display
10. Post copies of ad for customers in department
11. Post copies of ad for cashiers in department
12. Take ad merchandise stock counts
13. Inform buyers of ad merchandise not received
14. Communicate ad results to buyers
15. Move unsold ad merchandise to regular stock
16. Determine markdown for ad merchandise
17. Markdown unsold ad merchandise for clearance
18. Develop ad layouts
19. Write copy for ad layouts
20. Evaluate effectiveness of advertising
21. Plan advertising allowances
22. Budget advertising allowances

B. BUDGETING

1. Review prior profit and loss statement from prior period
2. Analyze current trends
3. Forecast future sales volume
4. Estimate gross markup
5. Project fixed costs
6. Project variable costs
7. Compute planned profit
8. Review budget with supervisor
9. Attain agreement on planned budget
10. Review budget weekly
11. Adjust budget to meet unusual conditions

C. CASH CONTROL

1. Balance daily sales receipts
2. Make up bank deposit
3. Make up daily change funds
4. Determine reasons for cash short or over
5. Counsel employees on cash errors
6. Deposit daily receipts
7. Forward sales documents to accounting office
8. Maintain adequate cash on hand
9. Pick up cash as required
10. Keep cash secure at all times
11. Read out registers daily
12. Audit change funds daily

D. CHECK CASHING APPROVAL

1. Examine checks for approval
2. Determine if checks are acceptable
3. Approve acceptable checks for cashing
4. Advise customer why check is unacceptable
5. Audit cashiers for check cashing violations
6. Counsel employees on check cashing violations

E. COMMUNICATIONS

1. Maintain current employee bulletin board
2. Disseminate important information
3. Conduct employee meetings
4. Insure all communications understood
5. Listen to employee suggestions and problems
6. Advise supervisor of employee concerns
7. Complete all records accurately, on schedule

F. COMPETITIVE SHOPPING

1. Make competitive shopping tours
2. Compare merchandise quality and price
3. Observe customer shopping
4. Look for new merchandising methods
5. Complete competitive shopping reports
6. Correct price discrepancies with other stores

G. CUSTOMER SERVICE

1. Talk to customers
2. Locate merchandise for customers

G. CUSTOMER SERVICE (continued)

3. Listen to customer complaints
4. Make disposition of customer complaints
5. Determine reasons for customer complaints
6. Correct conditions leading to complaints
7. Approve/disapprove customer returns
8. Approve/disapprove customer merchandise exchange
9. Advise buyers of merchandise requested not stocked

H. PERSONNEL

1. Enforce company personnel policies and procedures
2. Establish standards of employee performance
3. Communicate personnel standards and policies
4. Determine employees not meeting standards
5. Analyze reasons employees not meeting standards
6. Counsel employees on need for improvement
7. Establish goals and schedule for improvement
8. Follow up on plans for employee improvement
9. Determine when termination required
10. Conduct exit interview
11. Complete employee termination report
12. Give new employee layout of department
13. Explain organization of department to new employee
14. Introduce new employee to staff
15. Explain job responsibilities to new employee
16. Explain standards of performance to new employee
17. Explain pertinent company policies to new employee
18. Assign staff for initial time period

24

H. PERSONNEL (continued)

19. Insure required forms completed for new employee
20. Determine staffing needs
21. Notify personnel of job opening
22. Determine requirement of job
23. Recruit qualified candidates
24. Screen applicants

I. HOUSEKEEPING AND MAINTENANCE

1. Establish housekeeping schedule
2. Inspect department for cleanliness
3. Maintain clean work/sales area
4. Comply with sanitation regulations
5. Insure all equipment in good repair
6. Determine needed repairs to property and equipment
7. Repair minor damage to property and/or equipment
8. Submit work order for major repairs to property and/or equipment
9. Maintain lighting fixtures

J. PAYROLL

1. Compute weekly hours for each person
2. Determine premium/overtime hours
3. Verify accuracy of hours worked on time sheet
4. Submit payroll time sheets
5. Distribute payroll checks
6. Comply with federal wage and hour regulations

K. BUYING AND MERCHANDISING

1. Maintain proper stock to sales ratio
2. Maintain balanced stock assortments
3. Return damaged merchandise for credit
4. Analyze overstocks
5. Clear out excess overstocks
6. Analyze understock conditions
7. Maintain stockroom inventory level
8. Clear out discontinued merchandise
9. Select items, lines to be stocked
10. Determine basic stock levels
11. Place orders with source
12. Write promotional orders
13. Forecast seasonal merchandise needs
14. Review past sales records
15. Maintain current price book
16. Make required price changes
17. Enter price changes in book
18. Supervise price marking
19. Check merchandise for accurate pricing
20. Keep price changes current
21. Maintain accurate shelf price tags
22. Correct mispriced merchandise

L. INVENTORY PREPARATION

1. Review inventory schedule
2. Organize backroom stock for counting
3. Count backroom stock

L. INVENTORY PREPARATION (continued)

4. Organize inventory staff
5. Train staff on inventory procedures
6. Supervise inventory taking
7. Audit inventory counts
8. Submit completed inventory counts

M. DISPLAY

1. Analyze customer traffic patterns
2. Determine merchandise layouts
3. Determine types of merchandising and display fixtures required
4. Group related merchandise
5. Determine types of display needed
6. Set up major displays
7. Supervise setting up of displays
8. Plan for seasonal displays
9. Supervise setting up seasonal merchandise displays
10. Determine need for merchandise displays
11. Determine tie-in items for displays
12. Supervise straightening of merchandise
13. Post signs
14. Maintain shelf layout
15. Phase out seasonal displays
16. Determine space required for seasonal displays
17. Determine best location for seasonal displays
18. Liquidate unsold seasonal merchandise
19. Determine location for new items
20. Determine location of impulse displays

M. DISPLAY (continued)

21. Determine stocking schedule
22. Determine required manhours to stock
23. Schedule floor stocking
24. Insure correct stocking methods are used
25. Supervise stocking
26. Maintain shelf/rack alignment
27. Rotate stock
28. Liquidate outdated/damaged merchandise

N. RECEIVING MERCHANDISE

1. Verify delivery address
2. Remove seals from trucks if attached
3. Check for damaged cases
4. Refuse delivery if warranted
5. Write damage report if necessary
6. Locate packing slip
7. Verify packing slip against Purchase Order
8. Verify number of cases against bill of lading
9. Record any visible damage
10. Obtain driver's signature for discrepancies
11. Note and record shortages
12. Sign bill of lading
13. Sign delivery record
14. Inspect contents of cases against packing slip
15. Count contents of cases against packing slip
16. Stamp, sign, date Purchase Order
17. Write detailed receiving slip if no Purchase Order

N. RECEIVING MERCHANDISE (continued)

18. Distribute merchandise to proper wholesale location
19. File Purchase Order warehouse copy
20. File packing slip copy
21. Route signed, stamped, dated Purchase Order to proper office
22. Log receiving documents in incoming shipment log

O. RECORD KEEPING

1. Maintain orderly record files
2. Record daily sales and expenses
3. Maintain current ordering records
4. Maintain current employee files
5. File all bulletins and memos

P. SAFETY

1. Train employee on safe work habits
2. Inspect department for safety hazards
3. Provide proper tools and equipment for work in department
4. Maintain fire extinguishers
5. Insure all fire exits accessible
6. Keep electrical panels accessible
7. Maintain proper overhead clearance in stockroom
8. Investigate accidents
9. Complete accident reports
10. Determine cause of accident
11. Correct unsafe conditions
12. Observe employees for unsafe acts
13. Counsel employees on safety on the job

P. SAFETY (continued)

14. Inspect company/customer property damage
15. Cooperate with insurance carrier investigator
16. Comply with OSHA regulations
17. Report damage to company or customer property to office

Q. SCHEDULING

1. Project anticipated sales
2. Analyze project work requirements
3. Compute selling hours required
4. Analyze skills and availability of personnel
5. Write weekly work schedule
6. Coordinate shifts and crossover help for sects
7. Organize daily work priorities
8. Assign work according to schedule
9. Adjust work schedule as needed
10. Evaluate work results

R. SECURITY

1. Control entry/exit during nonopen hours
2. Insure all areas have coverage
3. Keep receiving areas secure
4. Maintain stockroom security
5. Keep company records, forms secure
6. Audit employee cash handling
7. Inspect employee purchases
8. Observe suspicious customers
9. Aid in apprehending shoplifters

R. SECURITY (continued)

10. Appear in court as witness
11. Cooperate with store security personnel
12. Inspect department for evidence of pilferage
13. Relocate merchandise displays as needed
14. Secure display models
15. Supervise outside supplier representatives
16. Approve all manufacturers returns
17. Audit employee purchases
18. Control location of staff personal articles
19. Make sure employees are aware of department costs
20. Take theft markdowns

S. SUPERVISION

1. Tour department daily
2. Record jobs to be done
3. Establish job priorities
4. Determine reoccurring work
5. Assign jobs to employees
6. Follow-up job assignments at regular intervals
7. Inspect completed work
8. Make new job assignments
9. Carry-over incompleted work
10. Call in extra staff as needed
11. Train employees
12. Retrain employees
13. Perform job performance evaluations

S. SUPERVISION (continued)

14. Work within framework of policies and procedures
15. Make recommendations for change

T. SALESMANSHIP/MECHANICS OF SALE

1. Acknowledge potential customer
2. Ask questions of customer to determine needs
3. Take customer to location of wanted merchandise
4. Select merchandise from various price lines to allow customer choice
5. Describe benefits of merchandise to customer
6. Put merchandise in customer's hands
7. Suggest additional merchandise to increase amount of sale
8. Package merchandise for customer
9. Thank customer by name
10. Compliment customer on selection of merchandise
11. Suggest alternate places to purchase merchandise not carried by your store
12. Read prices on merchandise
13. Read classifying information from price tickets
14. Ring cash register
15. Count money taken from customer
16. Count money returned to customer
17. Add and subtract numbers
18. Compute percentages
19. Follow company policy on purchases by check and credit card(s)

U. PRODUCT KNOWLEDGE

1. Look at merchandise you are selling
2. Hold and feel merchandise to determine quality and amount of workmanship
3. Examine merchandise for quality and amount of workmanship
4. Read tags and labels for manufacturer's name
5. Read tags and labels for care of merchandise
6. Make comparisons with other merchandise
7. Determine what merchandise has to offer
8. Demonstrate uses of merchandise
9. Interpret the features of a product in terms of benefits to the customer
10. Analyze products in relation to current trends (such as fashion, style, innovations)
11. Explain service guarantees to customers
12. Explain warrantees to customers
13. Interpret directions for customers

V. CLOSING PROCEDURES/CUSTOMER RETURNS

1. Gather price tickets from the day's business
2. Gather saleschecks from the day's business
3. Count receipts for day
4. Prepare deposit of day's receipts
5. Follow store procedures for closing registers
6. Follow store policy for returns
7. Treat customer with return courteously
8. Examine returned merchandise for damage
9. Suggest alternate merchandise to customer
10. Repair damaged merchandise for customer when possible

V. CLOSING PROCEDURES/CUSTOMER RETURNS (continued)

11. Determine the amount to be credited on return

12. Return damaged merchandise to manufacturer when defective

The Standard Industrial Classification of Establishments, 1975 edition. Using The Standard Industrial Classification of Establishments as a guide, a stratified sample of the population was taken.

The businesses selected were located on Oahu. The following is a list of employers and employees utilized in the survey:

1. Sears Roebuck and Co. (department store)
2. J. C. Penney Co., Inc. (department store)
3. Liberty House (department store)
4. Kramer's Men's & Boys' Wear (apparel and accessory)
5. McInerny (apparel and accessory)
6. Surf Line Hawaii (manufacture/wholesale)
7. McKesson & Robbins Drug Co. (wholesale)

Survey Instrument

The task survey packet contained a cover letter, instruction sheet, a background information sheet, a task inventory, and a return envelope. The cover letter (see Appendix B for example of cover letter) explained:

1. The purpose of the survey and contents of the packet.
2. The reasons why the reader has been selected as a respondent.
3. The importance of completing the survey.
4. The deadline for completing the survey.
5. An expression of appreciation for their assistance.

BACKGROUND INFORMATION SHEET

The background information sheet was the first page of the survey instrument. The background information solicited from the respondents were:

1. Job title
2. Type of business where employed
3. Education background
4. Number of years in present position
5. Number of years in the occupation

6. Number of hours working a week

7. Annual salary

(See Appendix C for example of background information sheet.)

INSTRUCTION SHEET

The instructions for completing the survey instrument followed the background information sheet and was printed on a separate page. (See Appendix D for example of instruction sheet.)

TASK INVENTORY

The task inventory was designed so the respondent checked (✓) if he/she did the task and then rated numerically (one through seven) on the amount of time spent performing the task. The task inventory survey instrument used was designed by the Center for Vocational and Technical Education, Ohio State University. (See Appendix E for example of Ohio State University Task Inventory Instrument.)

Distribution and Collection of Survey

The task inventory was printed on colored paper to facilitate collection and analyzing of data. For the stock/receiving/shipping occupation cluster, blue was used; for the display/buying/sales occupation cluster, pink was used; and for the supervisory/management occupation cluster, golden rod was used.

The personal distribution method was utilized to distribute and collect the survey. This method was selected in anticipation of a higher return percentage than if a mailed survey was used. No follow-up letters or follow-up postcards were utilized. Whenever possible, a telephone follow-up contact was employed in hopes of increasing the returns.

For the stock/receiving/shipping clerk occupation cluster, 80 surveys were distributed. There was a 65 percent return rate (52 completed surveys). For the display/buying/sales occupation cluster, 110 surveys were distributed; and 73 completed responses (66.4 percent) were received. For the supervisory/management occupation cluster, 100 surveys were distributed; and 48 completed surveys (48 percent) were returned.

FINDINGS

SHIPPING/RECEIVING/STOCK OCCUPATION CLUSTER

Description of Respondents:

The number of respondents by job title were as follows:

TABLE 3

PERCENTAGE OF RESPONDENTS BY JOB TITLE (STOCK/RECEIVING/SHIPPING)

Job Title	Number of Respondents	%
Stock Clerk	22	42.3
Receiving Clerk	18	34.6
Shipping/Warehouse/Traffic	10	19.3
Other	2	3.8
	52	100.0

An analysis of the data in Table 3 regarding the number of respondents by job title indicated that a large proportion (42.3 percent) were employed as stock clerks. Another 34.6 percent were employed as receiving clerks, and 19.3 percent were employed as shipping/warehouse/traffic clerks. A smaller proportion (3.8 percent) were employed in other titles of occupations not listed in the survey.

TABLE 4

TYPE OF BUSINESS PRESENTLY WORKING (STOCK/RECEIVING/SHIPPING)

Category	Number of Respondents	%
Apparel and Accessories	26	50.0
General Merchandising	20	38.5
Wholesaling	4	7.7
Manufacturing	2	3.8
	52	100.0

The largest number of respondents (50.0 percent) were employed in the apparel and accessories type business; 38.5 percent were employed in general merchandising; 7.7 percent in wholesaling; and 3.8 percent in manufacturing.

TABLE 5

HIGHEST ACADEMIC LEVEL ACHIEVED
(SHIPPING/RECEIVING/STOCK)

Category	Number of Respondents	%
Less than high school	10	19.2
High school diploma or equivalent	22	42.3
Some college	14	26.9
Associate degree	4	7.7
Bachelor's degree	2	3.9
	52	100.0

The largest number of respondents (42.3 percent) indicated that a high school diploma or equivalent was the highest academic level achieved. Slightly more than one-fourth (26.9 percent) had some college, while only 7.7 percent achieved an associate degree.

The average yearly salary of the respondents that were employed full-time was $10,200. The respondents averaged 10.5 years at their present job and averaged 11.4 years in the merchandising/marketing career field.

Tabulation of Data:

Each task was analyzed to determine the percent of the respondents that actually did the task and the amount of time spent doing the task. Table 6 shows the findings of the survey and the task descriptions for all respondents employed in shipping/receiving/stock occupations.

TABLE 6

TASK JOB DESCRIPTION FOR SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK

Task Title	Percent of Workers Who Perform Task	Relative Mean
A. PREPARING MERCHANDISE FOR SHIPMENT		
1. Obtain shipping order from sales department	11.4	4.00
2. Write shipping invoice	23.1	4.50
3. Verify shipping authorization signatures	11.5	4.00
4. Assign warehouse personnel to collect merchandise	11.5	2.00
5. Count and sort merchandise	76.9	4.45
6. Check packing of merchandise	50.0	4.07
7. Assemble packing cases	38.5	3.80
8. Write address labels	30.8	4.75
9. Weigh packed cases	38.5	4.75
10. Prepare shipping documents	46.2	4.50
11. Fill in all parts of shipping forms	34.6	4.22
12. Include packing slip with shipment	34.6	4.33
13. Order trucks	11.5	3.00
14. Load trucks	46.2	4.00
15. Spot merchandise for loading by driver	30.8	3.63
16. Supervise loading of trucks	15.4	3.25
17. Enter seal number in log and driver's record	38.5	3.60
18. Verify time-in on driver's record	23.1	2.33

Task Title	Percent of Workers Who Perform Task	Relative Mean
A. PREPARING MERCHANDISE FOR SHIPMENT (cont'd)		
19. Verify time-out on driver's record	26.9	2.14
20. Box or package each order	38.5	4.40
B. DETERMINE CARRIER		
1. Select carrier by number of cases to be shipped	11.5	3.67
2. Select carrier by weight of shipment	7.7	4.00
3. Select carrier by material to be shipped	3.8	6.00
4. Select carrier by bulk volume of shipment	7.7	4.00
5. Select carrier by value of shipment	3.8	6.00
6. Select carrier by nature of shipment, e.g., perishable	0	0
7. Select carrier by geographical direction	3.8	3.00
8. Select carrier by reputation of carrier	11.5	2.33
C. SHIPPING DOCUMENTS/PROCESS DOCUMENTS		
1. Write bills of lading	19.2	2.40
2. Enter shipment in parcel post log	19.2	3.20
3. Affix postage to cartons	26.9	2.86
4. Enter shipment in UPS log	15.4	3.00
5. File bill of lading copy	19.2	3.40
6. File invoice copy	19.2	2.80
7. Log documents in outgoing shipment log	15.4	5.00
8. Sign and date invoice as shipped	30.8	3.63
9. Route invoice and B. O. L. to proper office	19.2	4.00

Task Title	Percent of Workers Who Perform Task	Relative Mean
D. RECEIVING MERCHANDISE		
1. Verify delivery address	26.9	4.14
2. Remove seals from trucks if attached	38.5	3.20
3. Check for damaged cases	26.9	4.71
4. Refuse delivery if warranted	15.4	2.50
5. Write damage report if necessary	15.4	4.00
6. Locate packing slip	34.6	3.67
7. Verify packing slip against Purchase Order	26.9	4.57
8. Verify number of cases against bill of lading	23.1	5.00
9. Record any visible damage	42.3	3.82
10. Obtain driver's signature for discrepancies	15.4	3.75
11. Note and record shortages	42.3	4.00
12. Sign bill of lading	15.4	4.50
13. Sign delivery record	38.5	3.70
14. Inspect contents of cases against packing slip	42.3	4.09
15. Count contents of cases against packing slip	38.5	4.20
16. Stamp, sign, date Purchase Order	23.1	4.67
17. Write detailed receiving slip if no Purchase Order	19.2	2.60
18. Distribute merchandise to proper wholesale location	42.3	4.91
19. File Purchase Order warehouse copy	7.7	3.50
20. File packing slip copy	15.4	5.00

	Task Title	Percent of Workers Who Perform Task	Relative Mean
D.	RECEIVING MERCHANDISE (cont'd)		
21.	Route signed, stamped, dated Purchase Order to proper office	19.2	3.80
22.	Log receiving documents in incoming shipment log	7.7	6.00
E.	STORING MERCHANDISE/INVENTORY CONTROL		
1.	Operate lift truck for storing heavy parts	34.6	3.89
2.	Use hand truck for moving cartons	65.4	5.29
3.	Identify storing method by alphabet	3.8	1.00
4.	Identify storing method by number	42.3	5.18
5.	Place merchandise on shelves in proper sequence according to system in use	53.8	4.93
6.	Take oversupply to warehouse	26.9	4.71
7.	Remove merchandise from cartons	61.5	4.69
8.	Place combustibles in proper containers	3.8	4.00
9.	Keep aisles clear of hazards	61.5	4.75
10.	Sweep floors	61.5	3.19
11.	Enter item on inventory control card	11.5	5.00
12.	Add quantity to previous balance	7.7	6.50
13.	Count stock	42.3	4.27
14.	Check actual count against control card	11.5	5.67
15.	Compile complete inventory count	11.5	5.00
16.	Deduct items sold from sales invoice	0	0

Task Title	Percent of Workers Who Perform Task	Relative Mean
F. FILLING SALES ORDERS AND SHOP ORDERS		
1. Verify item number to item	23.1	5.33
2. Select item ordered from shelf	23.1	5.33
3. Enter amount selected on sales invoice	7.7	4.50
4. Place compiled order in proper place	15.4	3.00
5. Enter amount delivered on shop order	7.7	5.50
6. Obtain signature for receipt of items	15.4	4.25
7. Post items to inventory cards	11.5	4.33

DISPLAY/BUYING/SALES OCCUPATION CLUSTER

Description of Respondents:

The number of respondents by job title were as follows:

TABLE 7

PERCENTAGE OF RESPONDENTS BY JOB TITLE (DISPLAY/BUYING/SALES)

Job Title	Number of Respondents	%
Display Person	3	4.1
Display Trimmer	5	6.8
Buyer	6	8.3
Assistant Buyer	4	5.5
Salesperson	50	68.5
Other	5	6.8
	73	100.0

An analysis of the data in Table 7 regarding the number of respondents by job title indicated an extremely large proportion (68.5 percent) were employed as salespeople.

TABLE 8

TYPE OF BUSINESS PRESENTLY WORKING (DISPLAY/BUYING/SALES)

Category	Number of Respondents	%
Apparel and Accessories	32	43.8
General Merchandising	41	56.2
	73	100.0

The respondents were about evenly divided between the apparel and accessories (43.8 percent) and the general merchandising (56.2 percent) type of businesses.

TABLE 9

HIGHEST ACADEMIC LEVEL ACHIEVED
(DISPLAY/BUYING/SALES)

Level of Education	Number of Respondents	%
Less than high school	2	2.7
High school diploma or equivalent	24	32.9
Some college	21	28.8
Associate degree	5	6.8
Bachelor's degree	21	28.8
	73	100.0

The largest number of respondents (32.9 percent) indicated that a high school diploma or equivalent was the highest academic level achieved. This high percentage (32.9 percent) can be attributed to the respondents who are employed at entry level sales positions.

The next largest percentage (28.8 percent) were respondents with bachelor's degrees or had some college education. Another 6.8 percent achieved an associate degree, and 2.7 percent had less than a high school diploma.

The average yearly salary of the respondents that were employed full-time was $10,800. The respondents averaged 8.7 years at their present job and 10.9 years in the merchandising/marketing career field.

Tabulation of Data:

Each task was analyzed to determine the percent of the respondents that actually did the task and the amount of time spent doing the task. Table 10 shows the findings of the survey and the task description for all respondents employed in the display/buying/sales occupations.

TABLE 10

TASK JOB DESCRIPTION FOR DISPLAY/BUYING/SALES CLERK

Task Title	Percent of Workers Who Perform Task	Relative Mean
A. PLANNING OF DISPLAYS		
1. Analyze customer traffic patterns	30.1	3.59
2. Determine merchandise layouts	35.6	4.00
3. Decide on types of merchandising fixtures required	24.7	3.89
4. Decide on types of displays needed	32.9	3.88
5. Plan for seasonal displays	21.9	4.25
6. Determine need for merchandise displays	32.9	3.83
7. Decide on tie-in items for display	32.9	4.00
8. Determine space required for seasonal displays	17.8	4.46
9. Select location for seasonal displays	21.9	4.06
10. Select location of impulse displays	28.8	4.14
11. Originate display ideas	30.1	3.91
12. Select location for new items	41.1	4.10
13. Coordinate display with other forms of promotion	39.7	4.41
B. CONSTRUCTION OF DISPLAYS		
1. Group related merchandise	31.5	4.39
2. Set-up major displays	20.6	4.53
3. Supervise setting up of displays	21.9	3.06
4. Supervise setting up seasonal merchandise displays	11.0	3.63

Task Title	Percent of Workers Who Perform Task	Relative Mean
B. CONSTRUCTION OF DISPLAYS (cont'd)		
5. Construct props using handtools	9.6	5.00
6. Arrange props	13.7	4.00
7. Arrange mannequins to display merchandise	16.4	4.00
8. Arrange furniture to display merchandise	8.2	3.83
9. Arrange backdrops to display merchandise	8.2	5.67
10. Assemble prefabricated display properties from wood using handtools	12.3	3.44
11. Assemble prefabricated display properties from fabrics using handtools	9.6	4.00
12. Assemble prefabricated display properties from glass using handtools	8.2	3.00
13. Assemble prefabricated display properties from paper using handtools	9.6	3.86
14. Assemble prefabricated display properties from plastic using handtools	8.2	3.17
15. Place price signs in displays	38.4	3.79
16. Place descriptive signs in displays	31.5	4.17
17. Phase out seasonal displays	12.3	5.11
18. Dismantle old displays	24.7	3.44
19. Letter show cards for displays	15.1	3.64
C. MAINTAINING OF DISPLAY		
1. Supervise straightening of merchandise	49.3	4.19
2. Post signs	52.1	3.63
3. Maintain shelf layout	34.3	4.00

Task Title	Percent of Workers Who Perform Task	Relative Mean
C. MAINTAINING OF DISPLAY (cont'd)		
4. Maintain shelf/rack alignment	28.8	4.10
5. Rotate stock	49.3	4.31
6. Effectively use point-of-sale material supplied by the manufacturer	28.8	4.29
D. ORDERING MERCHANDISE		
1. Select and order merchandise offered by manufacturer's representatives	15.1	4.73
2. Forecast seasonal merchandise needs	15.1	4.82
3. Review past sales records	24.7	4.78
4. Place orders with source	19.2	4.36
5. Write promotional orders	13.7	5.00
6. Select items, lines to be stocked	17.9	4.70
7. Determine basic stock levels	22.0	4.75
8. Authorize payments to suppliers and vendors	4.1	2.00
9. Conduct staff meeting with sales personnel to introduce new merchandise	13.7	4.20
E. PRICING		
1. Maintain current price book	19.2	4.29
2. Make required price changes	37.0	4.70
3. Enter price changes in book	27.4	4.35
4. Supervise price marking	17.9	3.77
5. Check merchandise for accurate pricing	54.8	4.05
6. Keep price changes current	42.5	4.81

Task Title	Percent of Workers Who Perform Task	Relative Mean
E. PRICING (cont'd)		
7. Give information to markers on price markups to print on price tickets	27.4	4.40
8. Give information to markers on price markdowns to print on price tickets	26.0	4.89
9. Give information to markers on manufacturer number, season code, and style number	24.7	4.61
F. MAINTAINING STOCK		
1. Maintain proper stock to sales ratio	34.2	4.72
2. Maintain balance stock assortments	28.8	4.57
3. Return damaged merchandise for credit	41.1	4.20
4. Analyze overstocks	24.7	4.28
5. Clear out excess overstocks	28.8	3.77
6. Analyze understock conditions	34.2	4.12
7. Maintain stockroom inventory level	21.9	3.69
8. Clear out discontinued merchandise	42.5	4.06
9. Maintain accurate shelf price tags	43.8	4.19
10. Correct mispriced merchandise	61.7	3.80
11. Allocate merchandise to branch store	20.5	4.33
12. Verify quantity of incoming merchandise against invoice	37.0	3.77
13. Verify quality of stock received	41.1	4.10
14. Inspect exchanged or refunded merchandise	83.0	4.17
15. Liquidate outdated merchandise	27.4	4.30
16. Liquidate damaged merchandise	38.4	4.29

Task Title	Percent of Workers Who Perform Task	Relative Mean
F. MAINTAINING STOCK (cont'd)		
17. Liquidate unsold seasonal merchandise	26.0	4.26
18. Determine stocking schedule	13.7	5.00
19. Determine required manhours to stock	12.3	4.56
20. Schedule floor stocking	17.8	4.15
21. Insure correct stocking methods are used	16.4	5.58
22. Supervise stocking	21.9	4.13
23. Clean and dust merchandise	75.3	4.15
24. Clean and dust fixtures holding merchandise	76.7	4.14
25. Report damaged merchandise fixtures	58.9	3.33
G. SALESMANSHIP/MECHANICS OF SALE		
1. Acknowledge potential customer	87.7	4.97
2. Ask questions of customer to determine needs	87.7	5.16
3. Take customer to location of wanted merchandise	89.0	5.06
4. Select merchandise from various price lines to allow customer choice	84.9	4.76
5. Describe benefits of merchandise to customer	87.7	5.22
6. Put merchandise in customer's hands	76.7	4.64
7. Suggest additional merchandise to increase amount of sale	86.3	4.89
8. Package merchandise for customer	80.8	5.24
9. Thank customer by name	79.5	4.21

	Task Title	Percent of Workers Who Perform Task	Relative Mean
G.	SALESMANSHIP/MECHANICS OF SALE (cont'd)		
10.	Compliment customer on selection of merchandise	80.8	4.53
11.	Suggest alternate places to purchase merchandise not carried by your store	74.0	3.78
12.	Read prices on merchandise	74.0	4.81
13.	Read classifying information from price tickets	53.4	4.69
14.	Ring cash register	87.7	5.22
15.	Count money taken from customer	87.7	5.17
16.	Count money returned to customer	96.3	5.29
17.	Add and subtract numbers	68.5	5.08
18.	Compute percentages	46.6	4.35
19.	Follow company policy on purchases by check and credit card(s)	84.9	5.37
H.	PRODUCT KNOWLEDGE		
1.	Look at merchandise you are selling	83.6	5.16
2.	Hold and feel merchandise to determine quality and amount of workmanship	79.5	5.03
3.	Examine merchandise for quality and amount of workmanship	78.1	4.88
4.	Read tags and labels for manufacturer's name	78.1	4.30
5.	Read tags and labels for care of merchandise	78.1	4.78
6.	Make comparisons with other merchandise	80.8	4.68
7.	Determine what merchandise has to offer	78.1	4.93
8.	Demonstrate uses of merchandise	71.2	5.00

Task Title	Percent of Workers Who Perform Task	Relative Mean
H. PRODUCT KNOWLEDGE (cont'd)		
9. Interpret the features of a product in terms of benefits to the customer	79.5	5.26
10. Analyze products in relation to current trends (such as fashion, style, innovations)	78.1	5.18
11. Explain service guarantees to customers	67.1	4.86
12. Explain warrantees to customers	83.0	5.07
13. Interpret directions for customers	64.4	4.87
I. CLOSING PROCEDURES/CUSTOMER RETURNS		
1. Gather price tickets from the day's business	28.8	3.71
2. Gather saleschecks from the day's business	56.2	4.22
3. Count receipts for day	16.4	4.08
4. Prepare deposit of day's receipts	11.0	5.00
5. Follow store procedures for closing registers	76.7	4.63
6. Follow store policy for returns	85.0	5.02
7. Treat customer with return courteously	86.3	4.02
8. Examine returned merchandise for damage	78.1	4.85
9. Suggest alternate merchandise to customer	80.8	4.98
10. Repair damaged merchandise for customer when possible	56.2	4.20
11. Determine the amount to be credited on return	71.2	4.48
12. Return damaged merchandise to manufacturer when defective	47.9	4.54

Task Title	Percent of Workers Who Perform Task	Relative Mean
J. CUSTOMER SERVICE		
1. Establish book of customer names and addresses	37.0	4.59
2. Call customers about special sales	42.5	3.97
3. Call customers about arrival of new merchandise	47.9	4.17
4. Compile list of store customer services	8.2	3.83
5. Verify location of merchandise in your store	60.3	4.61
6. Consult newspapers for advertised items in your store and competitors	60.3	5.14
7. Suggest opening a store charge account when applicable	79.5	4.60

SUPERVISORY/MANAGEMENT OCCUPATION CLUSTER

Description of Respondents:

The percentage of respondents by job title were as follows:

TABLE 11

PERCENTAGE OF RESPONDENTS BY JOB TITLE (SUPERVISORY/MANAGEMENT)

Job Title	Number of Respondents	%
Merchandise Manager	6	12.5
Department Manager	15	31.3
Assistant Department Manager	10	20.8
Section Supervisor	12	25.0
Store Manager	4	8.3
Other	1	2.1
	48	100.0

The mid-management positions (department managers, assistant department managers, and section supervisors) were the largest number of respondents (77.1 percent). Another 12.5 percent were employed as merchandise managers, and a smaller proportion (8.3 percent) were employed as store managers.

TABLE 12

TYPE OF BUSINESS PRESENTLY WORKING (SUPERVISORY/MANAGEMENT)

Category	Number of Respondents	%
Apparel and Accessories	16	33.3
General Merchandising	20	41.7
Wholesaling	8	16.7
Manufacturing	4	8.3
	48	100.0

The respondents were primarily from the general merchandising (41.7 percent) and apparel and accessories (33.3 percent) industry. The respondents from the wholesale and manufacturing industries combined were 25.0 percent.

TABLE 13

HIGHEST ACADEMIC LEVEL ACHIEVED
(SUPERVISORY/MANAGEMENT)

Category	Number of Respondents	%
Less than high school	1	2.1
High school diploma or equivalent	12	25.0
Some college	14	29.2
Associate degree	4	8.3
Bachelor's degree	17	35.4
	48	100.0

The largest number of respondents (35.4 percent) indicated that a bachelor's degree was the highest academic level achieved. Of those 17 respondents, only two received a bachelor's degree in business administration.

The next largest percentage (29.2 percent) were respondents with some college education as the highest academic level achieved. Another 25.0 percent achieved a high school diploma or equivalent, and 8.3 percent received an associate degree.

The average yearly salary of the respondents that were employed full-time was $13,300. The respondents averaged 6.8 years at their present position and averaged 13.6 years in the merchandising/marketing career field.

Tabulation of Data:

Each task was analyzed to determine the percent of the respondents that actually did the task and the amount of time spent doing the task. Table 14 shows the findings of the survey and the task description for all respondents employed in the supervisory/management occupations in the merchandising/marketing career field.

TABLE 14

TASK JOB DESCRIPTION FOR SUPERVISORY/MANAGEMENT OCCUPATIONS

Task Title	Percent of Workers Who Perform Task	Relative Mean
A. ADVERTISING		
1. Review weekly advertising schedule	79.2	6.41
2. Inform section people of ad merchandise required	56.3	4.10
3. Determine quantities of ad merchandise required	45.8	4.91
4. Supervise ordering of ad merchandise	50.0	4.14
5. Decide types of ad displays to be built	64.6	4.06
6. Coordinate location of ad displays	72.9	4.46
7. Supervise building of ad displays	41.7	3.83
8. Determine store signs needed	31.3	4.00
9. Order store signs for ad display	25.0	4.25
10. Post copies of ad for customers in department	39.6	4.88
11. Post copies of ad for cashiers in department	37.5	4.89
12. Take ad merchandise stock counts	75.0	5.00
13. Inform buyers of ad merchandise not received	72.9	4.03
14. Communicate ad results to buyers	62.5	4.59
15. Move unsold ad merchandise to regular stock	58.3	3.39
16. Determine markdown for ad merchandise	47.9	2.53
17. Markdown unsold ad merchandise for clearance	41.7	2.63

Task Title	Percent of Workers Who Perform Task	Relative Mean
A. ADVERTISING (cont'd)		
18. Develop ad layouts	27.1	3.06
19. Write copy for ad layouts	20.8	2.44
20. Evaluate effectiveness of advertising	83.3	6.00
21. Plan advertising allowances	56.3	3.17
22. Budget advertising allowances	39.6	3.79
B. BUDGETING		
1. Review prior profit and loss statement from prior period	45.8	6.29
2. Analyze current trends	39.6	5.70
3. Forecast future sales volume	45.8	6.35
4. Estimate gross markup	35.4	3.77
5. Project fixed costs	43.8	5.05
6. Project variable costs	43.8	5.81
7. Compute planned profit	41.7	4.40
8. Review budget with supervisor	45.8	6.42
9. Attain agreement on planned budget	37.5	4.61
10. Review budget weekly	45.8	5.80
11. Adjust budget to meet unusual conditions	33.3	4.32
C. CASH CONTROL		
1. Balance daily sales receipts	8.3	2.16
2. Make up bank deposit	14.6	2.03
3. Make up daily change funds	10.4	2.88
4. Determine reasons for cash short or over	22.9	3.30

Task Title	Percent of Workers Who Perform Task	Relative Mean
C. CASH CONTROL (cont'd)		
5. Counsel employees on cash errors	45.8	6.42
6. Deposit daily receipts	27.1	4.68
7. Forward sales documents to accounting office	20.8	4.93
8. Maintain adequate cash on hand	31.3	4.00
9. Pick up cash as required	25.0	4.18
10. Keep cash secure at all times	45.8	5.86
11. Read out registers daily	35.4	4.07
12. Audit change funds daily	12.5	2.87
D. CHECK CASHING APPROVAL		
1. Examine checks for approval	62.5	5.40
2. Determine if checks are acceptable	62.5	4.20
3. Approve acceptable checks for cashing	62.5	5.86
4. Advise customer why check is unacceptable	50.0	4.14
5. Audit cashiers for check cashing violations	29.2	2.09
6. Counsel employees on check cashing violations	56.3	4.91
E. COMMUNICATIONS		
1. Maintain current employee bulletin board	54.2	3.89
2. Disseminate important information	91.7	6.29
3. Conduct employee meetings	91.7	6.00
4. Insure all communications understood	87.5	6.18
5. Listen to employee suggestions and problems	79.2	5.93

Task Title	Percent of Workers Who Perform Task	Relative Mean
E. COMMUNICATIONS (cont'd)		
6. Advise supervisor of employee concerns	77.1	5.71
7. Complete all records accurately, on schedule	50.0	3.69
F. COMPETITIVE SHOPPING		
1. Make competitive shopping tours	64.6	6.67
2. Compare merchandise quality and price	66.7	6.27
3. Observe customer shopping	66.7	6.50
4. Look for new merchandising methods	62.5	6.19
5. Complete competitive shopping reports	60.4	5.75
6. Correct price discrepancies with other stores	56.3	4.69
G. CUSTOMER SERVICE		
1. Talk to customers	62.5	5.33
2. Locate merchandise for customers	64.6	4.97
3. Listen to customer complaints	62.5	5.17
4. Make disposition of customer complaints	60.4	3.83
5. Determine reasons for customer complaints	62.5	2.61
6. Correct conditions leading to complaints	58.3	2.14
7. Approve/disapprove customer returns	62.5	3.60
8. Approve/disapprove customer merchandise exchange	62.5	3.54
9. Advise buyers of merchandise requested not stocked	56.3	2.48

Task Title	Percent of Workers Who Perform Task	Relative Mean
H. PERSONNEL		
1. Enforce company personnel policies and procedures	81.3	5.72
2. Establish standards of employee performance	75.0	4.57
3. Communicate personnel standards and policies	79.2	4.20
4. Determine employees not meeting standards	83.3	5.28
5. Analyze reasons employees not meeting standards	77.1	4.77
6. Counsel employees on need for improvement	77.1	4.12
7. Establish goals and schedule for improvement	62.5	4.69
8. Follow-up on plans for employee improvement	56.3	5.06
9. Determine when termination required	66.7	3.19
10. Conduct exit interview	68.8	3.80
11. Complete employee termination report	75.0	2.33
12. Give new employee layout of department	66.7	2.77
13. Explain organization of department to new employee	62.5	2.10
14. Introduce new employee to staff	68.8	2.17
15. Explain job responsibilities to new employee	72.9	3.30
16. Explain standards of performance to new employee	75.0	3.29
17. Explain pertinent company policies to new employee	75.0	3.26

Task Title	Percent of Workers Who Perform Task	Relative Mean
H. PERSONNEL (cont'd)		
18. Assign staff for initial time period. Assign new employee to work with	66.7	2.00
19. Insure required forms completed for new employee	77.1	2.56
20. Determine staffing needs	47.9	2.15
21. Notify personnel of job opening	39.6	2.58
22. Determine requirement of job	35.4	2.13
23. Recruit qualified candidates	45.8	2.15
24. Screen applicants	54.2	3.33
I. HOUSEKEEPING AND MAINTENANCE		
1. Establish housekeeping schedule	70.8	4.54
2. Inspect department for cleanliness	62.5	4.85
3. Maintain clean work/sales area	70.8	4.63
4. Comply with sanitation regulations	64.6	2.02
5. Insure all equipment in good repair	68.8	4.08
6. Determine needed repairs to property and equipment	66.7	2.22
7. Repair minor damage to property and/or equipment	52.1	1.98
8. Submit work order for major repairs to property and/or equipment	66.7	2.71
9. Maintain lighting fixtures	58.3	2.63
J. PAYROLL		
1. Compute weekly hours for each person	52.1	5.39
2. Determine premium/overtime hours	47.9	4.83

	Task Title	Percent of Workers Who Perform Task	Relative Mean
J.	PAYROLL (cont'd)		
3.	Verify accuracy of hours worked on time sheet	41.7	3.44
4.	Submit payroll time sheets	43.8	2.17
5.	Distribute payroll checks	25.0	2.11
6.	Comply with federal wage and hour regulations	50.0	3.47
K.	BUYING AND MERCHANDISING		
1.	Maintain proper stock to sales ratio	35.4	5.81
2.	Maintain balanced stock assortments	31.3	4.40
3.	Return damaged merchandise for credit	37.5	3.89
4.	Analyze overstocks	25.0	4.05
5.	Clear out excess overstocks	20.8	5.29
6.	Analyze understock conditions	31.3	3.70
7.	Maintain stockroom inventory level	14.6	2.25
8.	Clear out discontinued merchandise	16.7	2.30
9.	Select items, lines to be stocked	14.6	2.17
10.	Determine basic stock levels	25.0	2.26
11.	Place orders with source	22.9	2.29
12.	Write promotional orders	20.8	3.56
13.	Forecast seasonal merchandise needs	27.1	3.15
14.	Review past sales records	45.8	5.58
15.	Maintain current price book	41.7	4.56
16.	Make required price changes	47.9	5.33
17.	Enter price changes in book	45.8	5.06

Task Title	Percent of Workers Who Perform Task	Relative Mean
K. BUYING AND MERCHANDISING (cont'd)		
18. Supervise price marking	18.8	2.72
19. Check merchandise for accurate pricing	33.3	4.69
20. Keep price changes current	39.6	4.36
21. Maintain accurate shelf price tags	43.8	4.89
22. Correct mispriced merchandise	29.2	2.64
L. INVENTORY PREPARATION		
1. Review inventory schedule	54.2	6.20
2. Organize backroom stock for counting	45.8	5.09
3. Count backroom stock	50.0	4.60
4. Organize inventory staff	43.8	5.91
5. Train staff on inventory procedures	45.8	4.00
6. Supervise inventory taking	52.1	6.75
7. Audit inventory counts	39.6	4.82
8. Submit completed inventory counts	54.2	3.57
M. DISPLAY		
1. Analyze customer traffic patterns	37.5	5.18
2. Determine merchandise layouts	31.3	4.29
3. Determine types of merchandising and display fixtures required	33.3	4.02
4. Group related merchandise	39.6	3.86
5. Determine types of display needed	35.4	3.30
6. Set-up major displays	22.9	2.75
7. Supervise setting up of displays	25.0	2.69

	Task Title	Percent of Workers Who Perform Task	Relative Mean
M.	DISPLAY (cont'd)		
8.	Plan for seasonal displays	20.8	2.88
9.	Supervise setting up seasonal merchandise displays	18.8	2.16
10.	Determine need for merchandise displays	27.1	2.63
11.	Determine tie-in items for displays	31.3	2.71
12.	Supervise straightening of merchandise	35.4	3.20
13.	Post signs	22.9	2.48
14.	Maintain shelf layout	37.5	4.54
15.	Phase out seasonal displays	31.3	2.48
16.	Determine space required for seasonal displays	25.0	2.97
17.	Determine best location for seasonal displays	25.0	2.14
18.	Liquidate unsold seasonal merchandise	18.8	2.83
19.	Determine location for new items	39.6	3.59
20.	Determine location of impulse displays	35.4	3.00
21.	Determine stocking schedule	16.7	3.20
22.	Determine required manhours to stock	22.9	2.57
23.	Schedule floor stocking	14.6	2.33
24.	Insure correct stocking methods are used	20.8	2.14
25.	Supervise stocking	27.1	2.46
26.	Maintain shelf/rack alignment	29.2	3.85
27.	Rotate stock	22.9	2.69
28.	Liquidate outdated/damaged merchandise	14.6	2.42

	Task Title	Percent of Workers Who Perform Task	Relative Mean
N.	RECEIVING MERCHANDISE (cont'd)		
21.	Route signed, stamped, dated Purchase Order to proper office	8.3	1.82
22.	Log receiving documents in incoming shipment log	10.4	2.63
O.	RECORD KEEPING		
1.	Maintain orderly record files	41.7	5.75
2.	Record daily sales and expenses	20.8	4.60
3.	Maintain current ordering records	29.2	4.14
4.	Maintain current employee files	37.5	3.07
5.	File all bulletins and memos	33.3	3.45
P.	SAFETY		
1.	Train employee on safe work habits	45.8	5.83
2.	Inspect department for safety hazards	39.6	4.59
3.	Provide proper tools and equipment for work in department	33.3	2.14
4.	Maintain fire extinguishers	6.3	2.17
5.	Insure all fire exits accessible	10.4	2.63
6.	Keep electrical panels accessible	12.5	3.23
7.	Maintain proper overhead clearance in stockroom	20.8	2.46
8.	Investigate accidents	45.8	4.73
9.	Complete accident reports	33.3	4.77
10.	Determine cause of accident	18.8	2.27
11.	Correct unsafe conditions	29.2	3.08
12.	Observe employees for unsafe acts	25.0	2.66

	Task Title	Percent of Workers Who Perform Task	Relative Mean
P.	SAFETY (cont'd)		
13.	Counsel employees on safety on the job	31.3	3.05
14.	Inspect company/customer property damage	16.7	2.50
15.	Cooperate with insurance carrier investigator	16.7	2.08
16.	Comply with OSHA regulations	14.6	2.62
17.	Report damage to company or customer property to office	20.8	2.73
Q.	SCHEDULING		
1.	Project anticipated sales	25.0	2.09
2.	Analyze project work requirements	22.9	2.50
3.	Compute selling hours required	27.1	2.67
4.	Analyze skills and availability of personnel	16.7	1.20
5.	Write weekly work schedule	31.3	2.91
6.	Coordinate shifts and crossover help for sects	33.3	4.80
7.	Organize daily work priorities	41.7	3.75
8.	Assign work according to schedule	56.3	5.71
9.	Adjust work schedule as needed	54.2	5.14
10.	Evaluate work results	58.3	6.06
R.	SECURITY		
1.	Control entry/exit during nonopen hours	8.3	1.75
2.	Insure all areas have coverage	6.3	1.66
3.	Keep receiving areas secure	12.5	3.46
4.	Maintain stockroom security	8.3	2.66

	Task Title	Percent of Workers Who Perform Task	Relative Mean
R.	SECURITY (cont'd)		
5.	Keep company records, forms secure	6.3	2.05
6.	Audit employee cash handling	4.2	2.88
7.	Inspect employee purchases	8.3	2.59
8.	Observe suspicious customers	20.8	2.63
9.	Aid in apprehending shoplifters	16.7	2.67
10.	Appear in court as witness	8.3	1.53
11.	Cooperate with store security personnel	20.8	5.86
12.	Inspect department for evidence of pilferage	25.0	6.79
13.	Relocate merchandise displays as needed	16.7	5.11
14.	Secure display models	20.8	5.64
15.	Supervise outside supplier representatives	18.8	2.29
16.	Approve all manufacturers returns	14.6	2.33
17.	Audit employee purchases	6.3	1.66
18.	Control location of staff personal articles	10.4	2.50
19.	Make sure employees are aware of department costs	22.9	4.33
20.	Take theft markdowns	4.2	2.50
S.	SUPERVISION		
1.	Tour department daily	43.8	3.60
2.	Record jobs to be done	31.3	2.33
3.	Establish job priorities	60.4	2.25
4.	Determine reoccurring work	52.1	3.75

Task Title	Percent of Workers Who Perform Task	Relative Mean
S. SUPERVISION (cont'd)		
5. Assign jobs to employees	64.6	5.75
6. Follow-up job assignments at regular intervals	56.3	3.07
7. Inspect completed work	43.8	2.69
8. Make new job assignments	50.0	2.50
9. Carry over incompleted work	18.8	2.77
10. Call in extra staff as needed	58.3	2.40
11. Train employees	66.7	5.35
12. Retrain employees	62.5	5.29
13. Perform job performance evaluations	70.4	4.19
14. Work within framework of policies and procedures	70.4	6.15
15. Make recommendations for change	68.8	4.58
T. SALESMANSHIP/MECHANICS OF SALE		
1. Acknowledge potential customer	87.5	5.08
2. Ask questions of customer to determine needs	89.6	4.37
3. Take customer to location of wanted merchandise	87.5	4.35
4. Select merchandise from various price lines to allow customer choice	85.4	5.29
5. Describe benefits of merchandise to customer	81.3	5.17
6. Put merchandise in customer's hands	79.2	4.22
7. Suggest additional merchandise to increase amount of sale	79.2	5.69
8. Package merchandise for customer	75.0	4.81

Task Title	Percent of Workers Who Perform Task	Relative Mean
T. SALESMANSHIP/MECHANICS OF SALE (cont'd)		
9. Thank customer by name	70.8	4.02
10. Compliment customer on selection of merchandise	75.0	4.97
11. Suggest alternate places to purchase merchandise not carried by your store	83.3	5.22
12. Read prices on merchandise	87.5	4.21
13. Read classifying information from price tickets	41.7	4.76
14. Ring cash register	72.9	4.89
15. Count money taken from customer	87.5	5.06
16. Count money returned to customer	87.5	4.35
17. Add and subtract numbers	64.6	4.11
18. Compute percentages	45.8	3.58
19. Follow company policy on purchases by check and credit card(s)	85.4	5.75
U. PRODUCT KNOWLEDGE		
1. Look at merchandise you are selling	72.9	4.88
2. Hold and feel merchandise to determine quality and amount of workmanship	75.0	4.30
3. Examine merchandise for quality and amount of workmanship	72.9	5.03
4. Read tags and labels for manufacturer's name	70.8	5.16
5. Read tags and labels for care of merchandise	72.9	4.87
6. Make comparisons with other merchandise	79.2	5.18
7. Determine what merchandise has to offer	75.0	5.26

	Task Title	Percent of Workers Who Perform Task	Relative Mean
U.	PRODUCT KNOWLEDGE (cont'd)		
8.	Demonstrate uses of merchandise	79.2	5.00
9.	Interpret the features of a product in terms of benefits to the customer	81.3	4.78
10.	Analyze products in relation to current trends (such as fashion, style, innovations)	62.5	4.30
11.	Explain service guarantees to customers	77.1	5.07
12.	Explain warrantees to customers	75.0	4.93
13.	Interpret directions for customers	56.3	4.68
V.	CLOSING PROCEDURES/CUSTOMER RETURNS		
1.	Gather price tickets from the day's business	18.8	4.54
2.	Gather saleschecks from the day's business	56.3	4.48
3.	Count receipts for day	25.0	4.20
4.	Prepare deposit of day's receipts	20.8	5.98
5.	Follow store procedures for closing registers	70.8	4.85
6.	Follow store policy for returns	89.6	4.02
7.	Treat customer with return courteously	83.3	5.02
8.	Examine returned merchandise for damage	72.9	4.63
9.	Suggest alternate merchandise to customer	81.3	5.00
10.	Repair damaged merchandise for customer when possible	25.0	4.08
11.	Determine the amount to be credited on return	79.2	4.22
12.	Return damaged merchandise to manufacturer when defective	64.6	3.65

CONCLUSIONS

The purpose of this project was to develop a Competency-Based Education Curriculum Guide for the General Merchandising/Marketing program area. To reach the primary objective, the following procedures were utilized:

1. A General Merchandising/Marketing program advisory committee was formed.
2. The advisory committee and the college reviewed and developed a list of occupations that training will be provided for.
3. Task inventories were developed on the selected occupations.
4. Surveys were taken to determine which tasks are essential to secure employment.

In reviewing the findings the following conclusions are provided:

1. The type of occupations selected in the General Merchandising/Marketing program area are primarily entry level positions.
2. The task list constructed identifies those tasks which are performed by experienced workers in the General Merchandising/Marketing program area.
3. A task job description for the job titles of:

   shipping/receiving/stock/traffic/warehouse clerk, display/buying/sales clerk, and supervisory/management occupations in the General Merchandising/Marketing program area.
4. The degree and type of skills needed for entry level employment varied between businesses.
5. The small percentage of associate degree holders in each of the occupational clusters (7.7 percent in shipping/receiving/stock, 6.8 percent in display/buying/sales, and 8.3 percent in supervisory/management) shows a need to determine why the community college graduates are not employed in their vocational education.

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APPENDIX A

LIST OF OCCUPATIONS IN GENERAL MERCHANDISING/MARKETING PROGRAM AREA

APPENDIX A

LIST OF OCCUPATIONS IN GENERAL MERCHANDISING/MARKETING PROGRAM AREA

ADVERTISING SERVICES

Occupations of people who are involved in planning, developing, placing, and evaluating the creation and sales promotion activities that use displays, merchandising aids, and mass media in such businesses as advertising agencies, display houses, retail and wholesale establishments, and production industries.

1. Market research analyst - (D.O.T. 050.088)
2. Copywriter - (D.O.T. 132.088)
3. Advertising layout person - (D.O.T. 141.081)
4. Advertising production manager - (D.O.T. 141.168)
5. Display manager - (D.O.T. 142.031)
6. Time and space buyer - (D.O.T. 162.158)
7. Advertising assistant - (D.O.T. 164.068)
8. Direct-mail specialist - (D.O.T. 164.068)
9. Advertising manager - (D.O.T. 164.118)
10. Advertising director - (D.O.T. 164.118)
11. Account executive - (D.O.T. 164.168)
12. Dealer-contact person - (D.O.T. 165.068)
13. Counter clerk - (D.O.T. 249.368)
14. Trading stamps salesperson - (D.O.T. 252.358)
15. Radio and television time salesperson - (D.O.T. 253.358)
16. Signs and displays salesperson - (D.O.T. 258.258)
17. Signs salesperson - (D.O.T. 258.358)
18. Display person - (D.O.T. 298.081)
19. Sample distributor crew supervisor - (D.O.T. 299.138)
20. Sample distributor - (D.O.T. 299.887)

APPAREL AND ACCESSORIES

Occupations of people who perform activities related to the variety of sales, fashion coordination, and sales-supporting tasks in retail and wholesale businesses that are engaged in selling clothing of all kinds including related articles for personal wear and adornment.

1. Fashion coordinator - (D.O.T. 185.158)

2. Sample person - (D.O.T. 223.884)

SALESPERSON:

   3. Orthopedic shoes - (D.O.T. 263.258)
   4. Footwear - (D.O.T. 263.358)
   5. Men's and boys' clothing - (D.O.T. 263.358)
   6. Uniforms - (D.O.T. 263.358)
   7. Women's and girls' apparel - (D.O.T. 263.358)
   8. Corsets - (D.O.T. 263.358)
   9. Fashion accessories - (D.O.T. 263.358)
   10. Furs - (D.O.T. 263.358)
   11. Men's furnishings - (D.O.T. 263.358)
   12. Shoes - (D.O.T. 263.358)
   13. Infants' and children's wear - (D.O.T. 263.358)
   14. Millinery - (D.O.T. 263.358)
   15. Women's garments - (D.O.T. 263.358)
   16. Leather goods - (D.O.T. 264.358)
   17. Textile designs - (D.O.T. 276.358)
   18. Shoe leather and findings - (D.O.T. 281.358)
   19. Jewelry and optical goods - (D.O.T. 283.358)
   20. Jewelry - (D.O.T. 283.358)

AUTOMOTIVE

Occupations of people who perform a variety of sales and sales-supporting activities in retail, wholesale, and service businesses engaged in selling, renting, storing, or servicing cars and trucks and in selling automotive parts, accessories, and equipment.

1. Parts manager - (D.O.T. 185.168)
2. Service manager - (D.O.T. 187.168)
3. Storage garage manager - (D.O.T. 187.168)
4. Vehicle leasing and rental manager - (D.O.T. 187.168)

SALESPERSON:

5. Automobile - (D.O.T. 280.358)
6. Automobile parts - (D.O.T. 280.358)
7. Motor vehicles and supplies - (D.O.T. 280.358)
8. Parts - (D.O.T. 289.358)
9. Car locator - (D.O.T. 296.368)
10. Car wash supervisor - (D.O.T. 915.137)
11. Automobile appraiser - (D.O.T. 299.287)
12. Automobile repair-service salesperson - (D.O.T. 620.281)
13. Parking lot attendant - (D.O.T. 915.878)
14. Car rental clerk - (D.O.T. 919.478)

GENERAL MERCHANDISE

Occupations of people who perform activities that are related to a variety of sales and sales-supporting tasks for businesses primarily engaged in selling various types of merchandise at retail in department stores, junior department stores, variety stores, general merchandise stores, discount stores, and catalog houses.

1. Buyer - (D.O.T. 162.158)
2. New account clerk - (D.O.T. 249.368)

SALESPERSON:

3. Yard goods - (D.O.T. 263.458)
4. Cosmetics and toiletries - (D.O.T. 266.358)
5. China and glassware - (D.O.T. 274.358)
6. Silverware - (D.O.T. 283.458)
7. General - (D.O.T. 289.458)
8. Building and construction equipment and supplies - (D.O.T. 276.358)
9. Construction machinery - (D.O.T. 276.258)
10. Hardware supplies - (D.O.T. 276.258)
11. General hardware - (D.O.T. 276.358)
12. Dairy supplies - (D.O.T. 277.358)
13. Farm and garden equipment and supplies - (D.O.T. 277.358)
14. Sales attendant - (D.O.T. 290.468)

15. Personal shopper - (D.O.T. 296.358)
16. Comparison shopper - (D.O.T. 296.388)
17. Demonstrator - (D.O.T. 297.458)

MANAGER:

18. Department - (D.O.T. 299.138)
19. Store - (D.O.T. 185.168)
20. Merchandise - (D.O.T. 185.168)

MANAGER:

21. Trainee - (D.O.T. 189.168)
22. Service establishment - (D.O.T. 187.168)

23. Bridal consultant
24. Delivery person
25. Assistant buyer
26. Service director
27. Junior executive
28. Marker
29. Cashier
30. Collector
31. Sales-clerk writer
32. Contract clerk
33. Yard person

FOOD DISTRIBUTION

Occupations of people who perform a variety of sales and sales-supporting activities in businesses primarily engaged in selling food for home preparation and consumption or selling a general or commodity line of food products at wholesale.

1. Broker - (D.O.T. 162.158)
2. Commissary person - (D.O.T. 185.168)
3. Doughnut shop manager - (D.O.T. 185.168)
4. Bakery products checker - (D.O.T. 223.487)

SALESPERSON:

5. Livestock - (D.O.T. 261.258)
6. Food products - (D.O.T. 262.358)
7. Driver - (D.O.T. 292.358)
8. Driver helper - (D.O.T. 292.887)

9. Grocery person - (D.O.T. 290.468)
10. Buyer - (D.O.T. 162.158)
11. Peddler - (D.O.T. 291.858)
12. Supermarket department head
13. Cashier-checker - (D.O.T. 299.468)
14. Bakery girl - (D.O.T. 299.587)
15. Bagger

HARDWARE, BUILDING MATERIALS, FARM AND GARDEN SUPPLIES AND EQUIPMENT

Occupations of people who perform activities that are related to various sales and sales-supporting tasks in businesses engaged primarily in selling one or more of the following product lines at retail, at wholesale, or to contractors: hardware, paints, wallpaper, lumber, building materials, supplies, and equipment for home construction or farm and garden supplies and equipment.

1. Manager, service department
2. Contract clerk
3. Yard person

SALESPERSON:

4. Building and construction equipment and supplies
5. Construction machinery
6. Hardware supplies
7. Cattle and poultry food supplements
8. General hardware
9. Dairy supplies
10. Farm and garden equipment and supplies
11. Poultry equipment and supplies
12. Tractor and farm implements

HOME FURNISHINGS

Occupations of people who perform activities that relate to various sales and sales-supporting tasks in retail and wholesale businesses engaged primarily in selling home furnishings, such as furniture, household appliances, floor coverings, draperies, and specialized lines of home items.

1. Secondhand furniture dealer
2. Appliance service supervisor
3. Appraiser, furniture

SALESPERSON:

4. Upholstery and furniture repair
5. Custom drapery
6. Floor coverings
7. House furnishings
8. Curtain and drapery
9. Furniture
10. Stereo/hi-fi
11. Gas or electric appliances
12. Household equipment
13. Radio and television parts
14. Sewing machine
15. Television and appliances

16. Floor coverings estimator
17. Drapery and upholstery estimator
18. Furniture inspector

INSURANCE

Occupations of people performing activities that are related to the tasks performed by insurance carriers of all types or by agents representing carriers and brokers who deal in the sale or placement of insurance contracts with carriers.

1. Estate planner
2. Underwriter
3. Hospital insurance representative
4. Insurance manager
5. Insurance office manager
6. Salesperson, insurance

REAL ESTATE

Occupations of people who perform activities that are related to tasks performed by businesses in real estate brokerages or other firms engaged in buying, selling, appraising, renting, managing, and leasing of real property.

1. Property rental agent
2. Real estate agent
3. Building superintendent

MANAGER:

4. Franchise promotion
5. Apartment house
6. Housing project
7. Property
8. Retail department

9. Real estate appraiser
10. Salesperson, real estate
11. Sales representative

WHOLESALE TRADE, OTHER

Occupations of people who perform marketing and distributive activities for businesses engaged in selling goods to retailers, industrial, commercial, institutional, and professional users or bringing buyer and seller together which have not been listed previously.

1. Distribution warehouse manager
2. Wholesaler
3. Receiving clerk
4. Shipping clerk
5. Salesperson, general merchandise
6. Warehouse person
7. Stockperson
8. Marker
9. Warehouse traffic person
10. Traffic clerk

APPENDIX B

SAMPLE COPY OF COVER LETTER

UNIVERSITY OF HAWAII · KAPIOLANI COMMUNITY COLLEGE

Instructional Services Office

MEMORANDUM

TO:

FROM: Kapiolani Community College

The Instructional Services Office at Kapiolani Community College is presently involved in a project to develop new instructional materials in your career field. We are presently attempting to verify an accurate task inventory of the work performed in your occupation.

You have been selected as a source of valid occupational information. We are seeking your assistance in developing the task inventory.

For this project to be successful, your kokua is vitally essential. Please give us about 20 minutes of your time to assist us to improve our instructional materials.

Thank you for your professional attitude and assistance.

620 Pensacola Street · Honolulu, Hawaii 96814 · Telephone: 531-4654

APPENDIX C

SAMPLE COPY OF BACKGROUND INFORMATION SHEET

BACKGROUND INFORMATION SHEET

THIS IS A CONFIDENTIAL DOCUMENT

THIS INFORMATION WILL BE USED FOR RESEARCH PURPOSES ONLY

INFORMATION WILL BE REPORTED BY GROUP ONLY, NOT BY INDIVIDUAL

Please complete this Information Sheet and return it with the survey form. The answers to these questions are of importance as we try to evaluate responses from a large number of people across Hawaii where requirements for specific jobs may be very different.

CHECK YOUR PRESENT JOB TITLE: (Check the one that is the most descriptive)(Check___)

Stock Clerk	______	Traffic Clerk	______
Receiving Clerk	______	Other(please write in)	______________
Shipping Clerk	______		______________
Warehouse Clerk	______		

The company name is:____.

CHECK THE TYPE OF BUSINESS IN WHICH YOU PRESENTLY WORK: (Check one_____)

Apparel & Accessories Merchandising	______	Manufacturing	______
General Merchandising	______	Other (please write in)	______________
Wholesaling	______		______________

HIGHEST ACADEMIC LEVEL COMPLETED: (check one_____)

Less than high school diploma	____	High school diploma or equivalent	____
Some College (no degree)	____	Associate degree	____
Bachelors (Major:______________)	____	Master' (Major:______________)	____

ARE YOU EMPLOYED FULL TIME IN YOUR PRESENT POSITION? _____yes _____no

If part time, how many hours a week do you work?

Less than 15	______	20 to 30 hours	______
15 to 20 hours	______	30 to 35 hours	______

Please write in the number of years of work experience for each of the following questions.

_____How many years have you worked at your present job? (enter number)

_____How many years have you worked in the Marketing/Merchandising field? (enter number)

PRESENT YEARLY SALARY FOR FULL TIME EMPLOYMENT (check one_____)

less than $5,000	______	$10,000 to $10,999	______
$5,000 to $6,999	______	$11,000 to $11,999	______
$7,000 to $7,999	______	$12,000 to $12,999	______
$8,000 to $8,999	______	$13,000 to $15,000	______
$9,000 to $9,999	______	more than $15,000	______

APPENDIX D

SAMPLE COPY OF INSTRUCTION SHEET

INSTRUCTIONS FOR COMPLETING TASK INVENTORY

Carefully read each of the task statements and place a check mark (✓) in the column labeled CHECK for each task which you perform on your present job.

After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

Time spent means the total time you spend on each task you are rating, compared with the time you spend on each of the other tasks you do.

At the bottom on any page, write in and rate any tasks you do which are not listed.

EXAMPLE:

SUPERVISOR/MANAGER TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

	CHECK	TIME SPENT
I. INVENTORY PREPARATION	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Review inventory schedule		
2. Organize backroom stock for counting	✓	3
3. Count backroom stock	✓	6
4. Organize inventory staff		
5. Train staff on inventory procedures		
6. Supervise inventory taking	✓	6
7. Submit completed inventory counts	✓	2

APPENDIX E

EXAMPLE OF OHIO STATE UNIVERSITY TASK INVENTORY SURVEY INSTRUMENT

SECRETARIAL SCIENCE TASK INVENTORY	Page 11 of 26 Pages	
LISTED BELOW ARE A DUTY AND THE TASKS WHICH IT INCLUDES. CHECK ALL TASKS WHICH YOU PERFORM. ADD ANY TASKS YOU DO WHICH ARE NOT LISTED, THEN RATE THE TASKS YOU HAVE CHECKED. F. PERFORMING STENOGRAPHIC ACTIVITIES	CHECK ✓ If Done	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Compose correspondence		
2. Edit letters dictated by employer		
3. Operate dictaphone		
4. Operate dictating machine		
5. Operate shorthand machine		
6. Transcribe (type) from dictaphone		
7. Take dictation at the typewriter (Type dictation as employer dictates)		
8. Take dictation over the telephone		
9. Transcribe (type) from shorthand machine tape (Stenograph)		
10. Transcribe (type) from shorthand outlines		
11. Type minutes of reports of meetings		
12. Write group proceedings and/or conferences in shorthand		
13. Write shorthand (any system)		
14. Write shorthand from more than one person (but only one at a time)		

APPENDIX F

TASK INVENTORY SURVEY INSTRUMENT FOR SHIPPING/RECEIVING/STOCK CLERKS OCCUPATIONAL CLUSTER

BACKGROUND INFORMATION SHEET

THIS IS A CONFIDENTIAL DOCUMENT

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INFORMATION WILL BE REPORTED BY GROUP ONLY, NOT BY INDIVIDUAL

Please complete this Information Sheet and return it with the survey form. The answers to these questions are of importance as we try to evaluate responses from a large number of people across Hawaii where requirements for specific jobs may be very different.

CHECK YOUR PRESENT JOB TITLE: (Check the one that is the most descriptive)(Check____)

Stock Clerk	______	Traffic Clerk	______
Receiving Clerk	______	Other(please write in)	______________
Shipping Clerk	______	______________________________	
Warehouse Clerk	______		

The company name is: ____.

CHECK THE TYPE OF BUSINESS IN WHICH YOU PRESENTLY WORK: (Check one_____)

Apparel & Accessories Merchandising	_____	Manufacturing	_____
General Merchandising	_____	Other (please write in)	____________
Wholesaling	_____	______________________________	

HIGHEST ACADEMIC LEVEL COMPLETED: (check one_____)

Less than high school diploma	_____	High school diploma or equivalent	_____
Some College (no degree)	_____	Associate degree	_____
Bachelors (Major:______________)	_____	Master' (Major:____________)	_____

ARE YOU EMPLOYED FULL TIME IN YOUR PRESENT POSITION? _____yes _____no

If part time, how many hours a week do you work?

Less than 15	______	20 to 30 hours	______
15 to 20 hours	______	30 to 35 hours	______

Please write in the number of years of work experience for each of the following questions.

_____How many years have you worked at your present job? (enter number)

_____How many years have you worked in the Marketing/Merchandising field? (enter number)

PRESENT YEARLY SALARY FOR FULL TIME EMPLOYMENT (check one_____)

less than $5,000	______	$10,000 to $10,999	______
$5,000 to $6,999	______	$11,000 to $11,999	______
$7,000 to $7,999	______	$12,000 to $12,999	______
$8,000 to $8,999	______	$13,000 to $15,000	______
$9,000 to $9,999	______	more than $15,000	______

INSTRUCTIONS FOR COMPLETING TASK INVENTORY

Carefully read each of the task statements and place a check mark (✓) in the column labeled CHECK for each task which you perform on your present job.

After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

Time spent means the total time you spend on each task you are rating, compared with the time you spend on each of the other tasks you do.

At the bottom on any page, write in and rate any tasks you do which are not listed.

EXAMPLE:

SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK--TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

C. SHIPPING DOCUMENTS/PROCESS DOCUMENTS	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Write bills of lading	✓	2
2. Enter shipment in parcel post log	✓	2
3. Affix postage to cartons		
4. Enter shipment in UPS log		
5. File bill of lading copy	✓	6
6. File invoice copy	✓	6
7. Log documents in outgoing shipment log	✓	4
8. Sign and date invoice as shipped	✓	3
9. Route invoice and B. O. L. to proper office		

SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK-TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
A. PREPARING MERCHANDISE FOR SHIPMENT		
1. Obtain shipping order from sales department		
2. Write shipping invoice		
3. Verify shipping authorization signatures		
4. Assign warehouse personnel to collect merchandise		
5. Count and sort merchandise		
6. Check packing of merchandise		
7. Assemble packing cases		
8. Write address labels		
9. Weigh packed cases		
10. Prepare shipping documents		
11. Fill in all parts of shipping forms		
12. Include packing slip with shipment		
13. Order trucks		
14. Load trucks		
15. Spot merchandise for loading by driver		
16. Supervise loading of trucks		
17. Enter seal number in log and driver's record		
18. Verify time-in on driver's record		
19. Verify time-out on driver's record		
20. Box or package each order		

SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK--TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have ckecked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Averag 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Averag
B. DETERMINE CARRIER		
1. Select carrier by number of cases to be shipped		
2. Select carrier by weight of shipment		
3. Select carrier by material to be shipped		
4. Select carrier by bulk volumne of shipment		
5. Select carrier by value of shipment		
6. Select carrier by nature of shipment, e.g. perishable		
7. Select carrier by geographical direction		
8. Select carrier by reputation of carrier		

IPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK--TASK INVENTORY

refully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled eck for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column beled Time Spent which closely estimates the amount of me you spend in performing the task.

C. SHIPPING DOCUMENTS/PROCESS DOCUMENTS	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Write bills of lading		
2. Enter shipment in parcel post log		
3. Affix postage to cartons		
4. Enter shipment in UPS log		
5. File bill of lading copy		
6. File invoice copy		
7. Log documents in outgoing shipment log		
8. Sign and date invoice as shipped		
9. Route invoice and B. O. L. to proper office		

SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK---TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

D. RECEIVING MERCHANDISE	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Averag 2. Below Average 3. Slightly Below Average, 4. About Average 5. Slightly Above Average: 6. Above Average 7. Very Much Above Average
1. Verify delivery address		
2. Remove seals from trucks if attached		
3. Check for damaged cases		
4. Refuse delivery if warranted		
5. Write damage report if necessary		
6. Locate packing slip		
7. Verify packing slip against Purchase Order		
8. Verify number of cases against bill of lading		
9. Record any visible damage		
10. Obtain driver's signature for discrepancies		
11. Note and record shortages		
12. Sign bill of lading		
13. Sign delivery record		
14. Inspect contents of cases against packing slip		
15. Count contents of cases against packing slip		
16. Stamp, sign, date Purchase Order		
17. Write detailed receiving slip if no Purchase Order		
18. Distribute merchandise to proper wholesale location		
19. File Purchase Order warehouse copy		
20. File packing slip copy		
21. Route, signed, stamped, dated Purchase Order to proper office		
22. Log receiving documents in incoming shipment log		
23. Log receiving documents in incoming shipment log		

SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK--TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled "Check" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

E. STORING MERCHANDISE/INVENTORY CONTROL	**CHECK** ✓ **IF DONE**	**TIME SPENT** 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Operate lift truck for storing heavy parts		
2. Use hand truck for moving cartons		
3. Identify storing method by alphabet		
4. Identify storing method by number		
5. Place merchandise on shelves in proper sequence according to system in use		
6. Take oversupply to warehouse		
7. Remove merchandise from cartons		
8. Place combustibles in proper containers		
9. Keep aisles clear of hazards		
10. Sweep floors		
11. Enter item on inventory control card		
12. Add quantity to previous balance		
13. Count stock		
14. Check actual count against control card		
15. Compile complete inventory count		
16. Deduct items sold from sales invoice		

SHIPPING/RECEIVING/STOCK/TRAFFIC/WAREHOUSE CLERK--TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled "Check" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

F. FILLING SALES ORDERS AND SHOP ORDERS	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Averag 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Averag
1. Verify item number to item		
2. Select item ordered from shelf		
3. Enter amount selected on sales invoice		
4. Place compiled order in proper place		
5. Enter amount delivered on shop order		
6. Obtain signature for receipt of items		
7. Post items to inventory cards		

APPENDIX G

TASK INVENTORY SURVEY INSTRUMENT FOR DISPLAY/BUYING/SALES OCCUPATIONAL CLUSTER

BACKGROUND INFORMATION SHEET

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Please complete this Information Sheet and return it with the survey form. The answers to these questions are of importance as we try to evaluate responses from a large number of people across Hawaii where requirements for specific jobs may be very different.

CHECK YOUR PRESENT JOB TITLE: (Check the one that is the most descriptive) (Check __)

Displayer (Merchandising) ______
Display Person ______
Display Trimmer ______
Buyer ______

Assistant Buyer ______
Buyer's Clerical ______
Salesperson ______
Other (please write in) ______________________
____

The company name is: ______________________________________.

CHECK THE TYPE OF BUSINESS IN WHICH YOU PRESENTLY WORK: (Check one ____)

Apparel & Accessories Merchandising ______
General Merchandising ______
Wholesaling ______

Manufacturing ______
Other (please write in) ______________
____

HIGHEST ACADEMIC LEVEL COMPLETED: (Check one ____)

Less than high school diploma ______
Some College (no degree) ______
Bachelors (Major: ________________) ______

High school diploma or equivalent ______
Associate degree ______
Master's (Major: ______________) ______

ARE YOU EMPLOYED FULL TIME IN YOUR PRESENT POSITION? ______ yes ______ no

If part time, how many hours a week do you work?

Less than 15 ______
15 to 20 hours ______

20 to 30 hours ______
30 to 35 hours ______

Please write in the number of years of work experience for each of the following questions.

______ How many years have you worked at your present job? (enter number)

______ How many years have you worked in the Marketing/Merchandising field? (enter number)

PRESENT YEARLY SALARY FOR FULL TIME EMPLOYMENT (Check one ____)

less than $5,000 ______
$5,000 to $6,999 ______
$7,000 to $7,999 ______
$8,000 to $8,999 ______
$9,000 to $9,999 ______

$10,000 to $10,999 ______
$11,000 to $11,999 ______
$12,000 to $12,999 ______
$13,000 to $15,000 ______
more than $15,000 ______

INSTRUCTIONS FOR COMPLETING TASK INVENTORY

Carefully read each of the task statements and place a check mark (✓) in the column labeled CHECK for each task which you perform on your present job.

After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

Time spent means the total time you spend on each task you are rating, compared with the time you spend on each of the other tasks you do.

At the bottom on any page, write in and rate any tasks you do which are not listed.

EXAMPLE:

ISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/
SSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

isted below are a duty and the task which it includes. heck all tasks which you perform. Add any tasks you do hich are not listed. Then rate only the tasks you have hecked by placing a number 1, 2, 3, 4, 5, 6, or 7, in he column labeled Time Spent which most closely estiates the amount of time you spend in performing the ask.

	CHECK	TIME SPENT
	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
I. CLOSING PROCEDURES/CUSTOMER RETURNS		
1. Gather price tickets from the day's business	✓	2
2. Gather saleschecks from the day's business	✓	2
3. Count receipts for day		
4. Prepare deposit of day's receipts		
5. Follow store procedures for closing registers	✓	1
6. Follow store policy for returns	✓	4
7. Treat customer with return courteously	✓	4
8. Examine returned merchandise for damage		
9. Suggest alternate merchandise to customer	✓	5
10. Repair damaged merchandise for customer when possible		

IS LAYER (MERCHANDISE)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/
SSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

isted below are a duty and the tasks which it includes. Check ll tasks which you perform. Add any tasks you do which are ot listed. Then rate only the task you have checked by placing mber 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent hich most closely estimates the amount of time you spend in per- ing the task.

	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
PLANNING OF DISPLAYS		
1. Analyze customer traffic patterns		
2. Determine merchandise layouts		
3. Decide on types of merchandising fixtures required		
4. Decide on types of displays needed		
5. Plan for seasonal displays		
6. Determine need for merchandise displays		
7. Decide on tie-in items for display		
8. Determine space required for seasonal displays		
9. Select location for seasonal displays		
10. Select location of impulse displays		
11. Originate display ideas		
12. Select location for new items		
13. Coordinate display with other forms of promotion		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

:

B. CONSTRUCTION OF DISPLAYS	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Group related merchandise		
2. Set up major displays		
3. Supervise setting up of displays		
4. Supervise setting up seasonal merchandise display		
5. Construct props using handtools		
6. Arrange props		
7. Arrange mannequins to display merchandise		
8. Arrange furniture to display merchandise		
9. Arrange backdrops to display merchandise		
10. Assemble prefabricated display properties from wood using hand tools		
11. Assemble prefabricated display properties from fabrics using handtools		
12. Assemble prefabricated display properties from glass using handtools		
13. Assemble prefabricated display properties from paper using handtools		
14. Assemble prefabricated display properties from plastic using handtools		
15. .Place price signs in displays		
16. Place descriptive signs in displays		
17. Phase out seasonal displays		
18. Dismantle old displays		
19. Letter show cards for displays		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ ASSISTANT BUYER/BUYER'S/GENERAL SALESPERSON

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

C. MAINTAINING OF DISPLAY	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Supervise straightening of merchandise		
2. Post signs		
3. Maintain shelf layout		
4. Maintain shelf/rack alignment		
5. Rotate stock		
6. Effectively use point-of-sale material supplied by the manufacturer		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

D. ORDERING MERCHANDISE	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Select and order merchandise offered by manufacturer's representatives		
2. Forecast seasonal merchandise needs		
3. Review past sales records		
4. Place orders with source		
5. Write promotional orders		
6. Select items, lines to be stocked		
7. Determine basic stock levels		
8. Authorize payments to suppliers and vendors		
9. Conduct staff meeting with sales personnel to introduce new merchandise		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

E. PRICING	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Maintain current price book		
2. Make required price changes		
3. Enter price changes in book		
4. Supervise price marking		
5. Check merchandise for accurate pricing		
6. Keep price changes current		
7. Give information to markers on price mark-up to print on price tickets		
8. Give information to markers on price mark-downs to print on price tickets		
9. Give information to markers on manufacturer number, season code, and style number		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spedn in performing the task.

F. MAINTAINING STOCK	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Maintain proper stock to sales ratio		
2. Maintain balance stock assortments		
3. Return damaged merchandise for credit		
4. Analyze overstocks		
5. Clear out execss overstocks		
6. Analyze understock conditions		
7. Maintain stockroom inventory level		
8. Clear out discontinued merchandise		
9. Maintain accurate shelf price tags		
10. Correct mispriced merchandise		
11. Allocate merchandise to branch store		
12. Verify quantity of incoming merchandise against invoice		
13. Verify quality of stock received		
14. Inspect exchanged or refunded merchandise		
15. Liquidate outdated merchandise		
16. Liquidate damaged merchandise		
17. Liquidate unsold seasonal merchandise		
18. Determine stocking schedule		
19. Determine required manhours to stock		
20. Schedule floor stocking		
21. Insure correct stocking methods are used		

F. MAINTAINING STOCK (CONTD.)		TIME SPENT
22. Supervise stocking		
23. Clean and dust merchandise		
24. Clean and dust fixtures holding merchandise		
25. Report damaged merchandise fixtures		

DIPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/
ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Listed below are a duty and the task which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

G. SALESMANSHIP/MECHANICS OF SALE	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Acknowledge potential customer		
2. Ask questions of customer to determine needs		
3. Take customer to location of wanted merchandise		
4. Select merchandise from various price lines to allow customer choice		
5. Describe benefits of merchandise to customer		
6. Put merchandise in customer's hands		
7. Suggest additional merchandise to increase amount of sale		
8. Package merchandise for customer		
9. Thank customer by name		
10. Compliment customer on selection of merchandise		
11. Suggest alternate places to purchase merchandise not carried by your store		
12. Read prices on merchandise		
13. Read classifying information from price tickets		
14. Ring cash register		
15. Count money taken from customer		
16. Count money returned to customer		
17. Add and subtract numbers		
18. Compute percentages		
19. Follow company policy on purchases by check and credit card(s)		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/
ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled "Check" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

H. PRODUCT KNOWLEDGE	✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Look at merchandise you are selling		
2. Hold and feel merchandise to determine quality and amount of workmanship		
3. Examine merchandise for quality and amount of workmanship		
4. Read tags and labels for manufacturer's name		
5. Read tags and labels for care of merchandise		
6. Make comparisons with other merchandise		
7. Determine what merchandise has to offer		
8. Demonstrate uses of merchandise		
9. Interpret the features of a product in terms of benefits to the customer		
10. Analyze products in relation to current trends (such as fashion, style, innovations)		
11. Explain service guarantees to customers		
12. Explain warrantees to customers		
13. Interpret directions for customers		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ ASSISTANT BUYER/BUYER'S CLERICAL/GENERAL SALESPERSON

Listed below are a duty and the task which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

I. CLOSING PROCEDURES/CUSTOMER RETURNS	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Gather price tickets from the day's business		
2. Gather saleschecks from the day's business		
3. Count receipts for day		
4. Prepare deposit of day's receipts		
5. Follow store procedures for closing registers		
6. Follow store policy for returns		
7. Treat customer with return courteously		
8. Examine returned merchandise for damage		
9. Suggest alternate merchandise to customer		
10. Repair damaged merchandise for customer when possible		
11. Determine the amount to be credited on return		
12. Return damaged merchandise to manufacturer when defective		

DISPLAY (MERCHANDISING)/DISPLAY PERSON/DISPLAY TRIMMER/BUYER/ASSISTANT BUYER/BUYER'S CLERICAL
GENERAL SALESPERSON

Carefully read each of the TASK STATEMENTS and place a check mark ( ) in the column labeled "Check" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

J. CUSTOMER SERVICE	✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Establish book of customer names and addresses		
2. Call customers about special sales		
3. Call customers about arrival of new merchandise		
4. Compile list of store customer services		
5. Verify location of merchandise in your store		
6. Consult newspapers for advertised items in your store and competitors		
7. Suggest opening a store charge account when applicable		
8. Inform customer of arrival date of merchandise presently out of stock		

APPENDIX H

TASK INVENTORY SURVEY INSTRUMENT FOR SUPERVISORY/MANAGEMENT OCCUPATIONAL CLUSTER

BACKGROUND INFORMATION SHEET

THIS IS A CONFIDENTIAL DOCUMENT

THIS INFORMATION WILL BE USED FOR RESEARCH PURPOSES ONLY

INFORMATION WILL BE REPORTED BY GROUP ONLY, NOT BY INDIVIDUAL

Please complete this Information Sheet and return it with the survey form. The answers to these questions are of importance as we try to evaluate responses from a large number of people across Hawaii where requirements for specific jobs may be very different.

CHECK YOUR PRESENT JOB TITLE: (Check the one that is the most descriptive.\Check ____)

Distribution Wholesale Manager ____
Assistant Distribution Wholesale Manager ____
Merchandise Manager ____
Assistant Merchandise Manager ____
Department Manager ____
Assistant Department Manager ____
Floor Supervisor ____
Section Supervisor ____
Other (please write in) ____
____

The company name is: ________________________.

CHECK THE TYPE OF BUSINESS IN WHICH YOU PRESENTLY WORK: (Check one ____)

Apparel & Accessories Merchandising ____
General Merchandising ____
Wholesaling ____
Manufacturing ____
Other (please write in) ____
____

HIGHEST ACADEMIC LEVEL COMPLETED: (Check one ____)

Less than high school diploma ____
Some College (no degree) ____
Bachelors (Major: ____________) ____
High school diploma or equivalent ____
Associate degree ____
Master's (Major: ____________) ____

ARE YOU EMPLOYED FULL TIME IN YOUR PRESENT POSITION? ____ yes ____ no

If part time, how many hours a week do you work?

Less than 15 ____
15 to 20 hours ____
20 to 30 hours ____
30 to 35 hours ____

Please write in the number of years of work experience for each of the following questions.

____ How many years have you worked at your present job? (enter number)

____ How many years have you worked in the Marketing/Merchandising field? (enter number)

PRESENT YEARLY SALARY FOR FULL TIME EMPLOYMENT (Check one ____)

less than $5,000 ____
$5,000 to $6,999 ____
$7,000 to $7,999 ____
$8,000 to $8,999 ____
$9,000 to $9,999 ____
$10,000 to $10,999 ____
$11,000 to $11,999 ____
$12,000 to $12,999 ____
$13,000 to $15,000 ____
more than $15,000 ____

INSTRUCTIONS FOR COMPLETING TASK INVENTORY

Carefully read each of the task statements and place a check mark (√) in the column labeled CHECK for each task which you perform on your present job.

After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

Time spent means the total time you spend on each task you are rating, compared with the time you spend on each of the other tasks you do.

At the bottom on any page, write in and rate any tasks you do which are not listed.

EXAMPLE:

SUPERVISOR/MANAGER TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (√) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

	CHECK	TIME SPENT
	√ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
L. INVENTORY PREPARATION		
1. Review inventory schedule		
2. Organize backroom stock for counting	√	3
3. Count backroom stock	√	6
4. Organize inventory staff		
5. Train staff on inventory procedures		
6. Supervise inventory taking	√	6
7. Submit completed inventory counts	√	2

SUPERVISOR/MANAGER---TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled "CHECK" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

A. ADVERTISING	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Review weekly advertising schedule		
2. Inform section people of ad merchandsie required		
3. Determine quantities of ad merchandise required		
4. Supervise ordering of ad merchandise		
5. Decide types of ad displays to be built		
6. Coordinate location of ad displays		
7. Supervise building of ad displays		
8. Determine store signs needed		
9. Order store signs for ad display		
10. Post copies of ad for customers in department		
11. Post copies of ad for cashiers in department		
12. Take ad merchandise stock counts		
13. Inform buyers of ad merchandise not received		
14. Communicate ad results to buyers		
15. Move unsold ad merchandise to regular stock		
16. Determine markdown for ad merchandise		
17. Markdown unsold ad merchandise for clearance		
18. Develop ad layouts		
19. Write copy for ad layouts		
20. Evaluate effectiveness of advertising		
21. Plan advertising allowances		
22. Budget advertising allowances		

SUPERVISOR/MANAGER---TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled "Check" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

B. BUDGETING	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Review prior profit and loss statement from prior period		
2. Analyze current trends		
3. Forecast future sales volume		
4. Estimate gross markup		
5. Project fixed costs		
6. Project variable costs		
7. Compute planned profit		
8. Review budget with supervisor		
9. Attain agreement on planned budget		
10. Review budget weekly		
11. Adjust budget to meet unusual conditions		

ISOR/MANAGER---TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (√) in the column labeled Check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

C. CASH CONTROL	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Balance daily sales receipts		
2. Make up bank deposit		
3. Make up daily change funds		
4. Determine reasons for cash short or over		
5. Counsel employees on cash errors		
6. Deposit daily receipts		
7. Forward sales documents to accounting office		
8. Maintain adequate cash on hand		
9. Pick up cash as required		
10. Keeps cash secure at all times		
11. Read out registers daily		
12. Audit change funds daily		

SUPERVISOR/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do hich are not listed. Then rate the tasks you have checked.

D. CHECK CASHING APPROVAL	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Avera 2. Below Average 3. Slightly Below Avera 4. About Average 5. Slightly Above Avera 6. Above Average 7. Very Much Above Averag
1. Examine checks for approval		
2. Determine if checks are acceptable		
3. Approve acceptable checks for cashing		
4. Advise customer why check is unacceptable		
5. Audit cashiers for check cashing violations		
6. Counsel employees on check cashing violations		

MANAGER TASK INVENTORY

below are a duty and the tasks which it includes.
all tasks which you perform. Add any tasks you do
are not listed. Then rate the tasks you have checked.

I. COMMUNICATIONS	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Maintain current employee bulletin board		
2. Disseminate important information		
3. Conduct employee meetings		
4. Insure all communications understood		
5. Listen to employee suggestions and problems		
6. Advise supervisor of employee concerns		
7. Complete all records accurately, on schedule		

SUPERVISOR/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate the tasks you have checked.

	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Avera 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
F. COMPETITIVE SHOPPING		
1. Make competitive shopping tours		
2. Compare merchandise quality and price		
3. Observe customer shopping		
4. Look for new merchandising methods		
5. Complete competitive shopping reports		
6. Correct price discrepancies with other stores		

MANAGER TASK INVENTORY

[illegible] are a duty and the tasks which it includes. [illegible] all tasks which you perform. Add any tasks you do [illegible] is not listed. Then rate the tasks you have checked.

	CHECK	TIME SPENT
	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
6. CUSTOMER SERVICE		
1. Talk to customers		
2. Locate merchandise for customers		
3. Listen to customer complaints		
4. Makes disposition of customer complaints		
5. Determine reasons for customer complaints		
6. Corrects conditions leading to complaints		
7. Approve/disapprove customer returns		
8. Approve/disapprove customer merchandise exchange		
9. Advise buyers of merchandise requested not stocked		

SUPERVISOR/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which is not listed. Then rate the tasks you have checked.

H. PERSONNEL	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Av 2. Below Average 3. Slightly Below Avera 4. About Average 5. Slightly Above Avera 6. Above Average 7. Very Much Above Ave
1. Enforce company personnel policies and procedures		
2. Establish standards of employee performance		
3. Communicate personnel standards and policies		
4. Determine employees not meeting standards		
5. Analyze reasons employees not meeting standard		
6. Counsel employees on need for improvement		
7. Establish goals and schedule for improvement		
8. Follow up on plans for employee improvement		
9. Determine when termination required		
10. Conduct exit interview		
11. Complete employee termination report		
12. Give new employee layout of department		
13. Explain organization of dept. to new employee		
14. Introduce new employee to staff		
15. Explain job responsibilities to new employee		
16. Explain standards of performance to new employee		
17. Explain pertinent company policies to new employee		
18. Assign staff for initial time period. ~~Assign new~~ employee to work with		
19. Insure required forms completed for new employee		
20. Determine staffing needs		
21. Notifies personnel of job opening		
22. Determine requirement of job		
23. Recruit qualified candidates		
24. Screen applicants		

MANAGER TASK INVENTORY

below are a duty and the tasks which it includes. tasks which you perform. Add any tasks you do are not listed. Then rate the tasks you have checked.

	CHECK	TIME SPENT
I. HOUSEKEEPING AND MAINTENANCE	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Establish housekeeping schedule		
2. Inspect department for cleanliness		
3. Maintain clean work/sales area		
4. Comply with sanitation regulations		
5. Insure all equipment in good repair		
6. Determine needed repairs to property and equipment		
7. Repair minor damage to property and/or equipment		
8. Submit work order for major repairs to property and/or equipment		
9. Maintain lighting fixtures		

SUPERVISOR/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate the tasks you have checked.

J. PAYROLL	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Av 2. Below Average 3. Slightly Below Avera 4. About Average 5. Slightly Above Avera 6. Above Average 7. Very Much Above Avera
1. Compute weekly hours for each person		
2. Determine premium/overtime hours		
3. Verify accuracy of hours worked on time sheet		
4. Submit payroll time sheets		
5. Distribute payroll checks		
6. Comply with federal wage and hour regulations		

TASK INVENTORY

are a duty and the tasks which it includes.
tasks which you perform. Add any tasks you do
are not listed. Then rate the tasks you have checked.

BUYING AND MERCHANDISING	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. ~~About Average~~ 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Maintain proper stock to sales ratio		
2. Maintain balanced stock assortments		
3. Return damaged merchandise for credit		
4. Analyze overstocks		
5. Clear out excess overstocks		
6. Analyze understock conditions		
7. Maintain stockroom inventory level		
8. Clear out discontinued merchandise		
9. Select items, lines to be stocked		
10. Determine basic stock levels		
11. Place orders with source		
12. Write promotional orders		
13. Forecast seasonal merchandise needs		
14. Review past sales records		
15. Maintain current price book		
16. Make required price changes		
17. Enter price changes in book		
18. Supervise price marking		
19. Check merchandise for accurate pricing		
20. Keep price changes current		
21. Maintain accurate shelf price tags		
22. Correct mispriced merchandise		

SUPERVISOR/MANAGER TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark( ) in the column labeled check for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, and 7 in the column labeled TIME SPENT which most closely estimates the amount of time you spend in performing the task.

	CHECK	TIME SPENT
I. INVENTORY PREPARATION	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Review inventory schedule		
2. Organize backroom stock for counting		
3. Count backroom stock		
4. Organize inventory staff		
5. Train staff on inventory procedures		
6. Supervise inventory taking		
7. Audit inventory counts		
8. Submit completed inventory counts		

[illegible]

[illegible] a duty and the tasks which it includes, [illegible] tasks which you perform. Add any tasks you do [illegible] are not listed. Then rate the tasks you have checked.

DISPLAY	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1 Analyze customer traffic patterns		
2. Determine merchandise layouts		
3. Determine types of merchandising and display fixtures required	–	
4. Group related merchandise		
5. Determine types of display needed		
6. Set up major displays		
7 Supervise setting up of displays		
Plan for seasonal displays		
9. Supervise setting up seasonal merchandise display		
10. Determine need for merchandise displays		
11. Determine tie-in items for display		
12. Supervise straightening of merchandise		
Post signs		
Maintain shelf layout		
Phase out seasonal displays		
Determine space required for seasonal displays		
Determine best location for seasonal displays		
[illegible] unsold seasonal merchandise		
Determine location for new items		
[illegible] location of impulse displays		
[illegible] stocking schedule		
[illegible] required manhours to stock		
[illegible] stocking		
[illegible] stocking methods are used		

SUPERVISOR/MANAGER TASK INVENTORY

DISPLAY

	CHECK	TIME SPENT
	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
25. Supervise stocking		
26. Maintain shelf/rack alignment		
27. Rotate stock		
28. Liquidate outdated/damaged merchandise		

MANAGER---TASK INVENTORY

ly read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled
each task which you perform on your present job. After checking all tasks which
, then rate only the task you have checked by
a number 1, 2, 3, 4, 5, 6, or 7, in the column
Time Spent which closely estimates the amount of
you spend in performing the task.

RECEIVING MERCHANDISE	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Verify delivery address		
2. Remove seals from trucks if attached		
3. Check for damaged cases		
4. Refuse delivery if warranted		
5. Write damage report if necessary		
6. Locate packing slip		
7. Verify packing slip against Purchase Order		
8. Verify number of cases against bill of lading		
9. Record any visible damage		
10. Obtain driver's signature for discrepancies		
11. Note and record shortages		
12. Sign bill of lading		
13. Sign delivery record		
14. Inspect contents of cases against packing slip		
15. Count contents of cases against packing slip		
16. Stamp, sign, date Purchase Order		
17. Write detailed receiving slip if no Purchase Order		
18. Distribute merchandise to proper wholesale location		
19. File Purchase Order warehouse copy		
20. File packing slip copy		
21. Route, signed, stamped, dated Purchase Order to proper office		
22. Log receiving documents in incoming shipment log		
23. Log receiving documents in incoming shipment log		

isted below are a duty and the tasks which it includes. heck all tasks which you perform. Add any tasks you do hich are not listed. Then rate the tasks you have checked.

	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Avera 2. Below Average 3. Slightly Below Averag 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Averag
0. RECORD KEEPING		
1. Maintain orderly record files		
2. Record daily sales and expenses		
3. Maintain current ordering records		
4. Maintain current employee files		
5. File all bulletins and memos		

[illegible] TASK INVENTORY

[illegible] a duty and the tasks which it includes. [illegible] which you perform. Add any tasks you do [illegible] not listed. Then rate the tasks you have checked.

SAFETY	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Train employee on safe work habits		
2. Inspect department for safety hazards		
3. Provide proper tools and equipment for work in department		
4. Maintain fire extinguishers		
5. Insure all fire exits accessible		
6. Keep electrical panels accessible		
7. Maintain proper overhead clearance in stock room		
8. Investigate accidents		
9. Complete accident reports		
10. Determine cause of accident		
11. Correct unsafe conditions		
12. Observe employees for unsafe acts		
13. Counsel employees on safety on the job		
14. Inspect company/customer property damage		
15. Cooperate with insurance carrier investigator		
16. Comply with OSHA regulations		
17. Report damage to company or customer property to office		

SUPERVISOR/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate the tasks you have checked.

	CHECK	TIME SPENT
Q. SCHEDULING	✓ IF DONE	1. Very Much Below A 2. Below Average 3. Slightly Below A 4. About Average 5. Slightly Above A 6. Above Average 7. Very Much Above A
1. Project anticipated sales		
2. Analyze project work requirements		
3. Compute selling hours required		
4. Analyze skills and availability of personnel		
5. Write weekly work schedule		
6. Coordinate shifts and crossover help for sects.		
7. Organize daily work priorities		
8. Assign work according to schedule		
9. Adjust work schedule as needed		
10. Evaluate work results		

[illegible]/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate the tasks you have checked.

	CHECK	TIME SPENT
a. SECURITY	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Control entry/exit during nonopen hours		
2. Insure all areas have coverage		
3. Keep receiving areas secure		
4. Maintain stock room security		
5. Keep company records, forms secure		
6. Audit employee cash handling		
7. Inspect employee purchases		
8. Observe suspicious customers		
9. Aid in apprehending shoplifters		
10. Appear in court as witness		
11. Cooperate with store security personnel		
12. Inspect department for evidence of pilferage		
13. Relocate merchandise displays as needed		
14. Secure display models		
15. Supervise outside supplier representatives		
16. Approve all manufacturers returns		
17. Audit employee purchases		
18. Control location of staff personal articles		
19. Make sure employees are aware of department costs		
20. Take theft markdowns		

SUPERVISOR/MANAGER TASK INVENTORY

Listed below are a duty and the tasks which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate the tasks you have checked.

5. SUPERVISION	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below 2. Below Average 3. Slightly Below 4. About Average 5. Slightly Above 6. Above Average 7. Very Much Above
1. Tour department daily		
2. Record jobs to be done		
3. Establish job priorities		
4. Determine reoccuring work		
5. Assign jobs to employees		
6. Follow up job assignments at regular intervals		
7. Inspect completed work		
8. Make new job assignments		
9. Carry over incompleted work		
10. Call in extra staff as needed		
11. Train employees		
12. Retrain employees		
13. Perform job performance evaluations		
14. Work within framework of policies and procedures		
15. Make recommendations for change		

SUPERVISOR/MANAGER---TASK INVENTORY

Listed below are a duty and the task which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

T. SALESMANSHIP/MECHANICS OF SALE	CHECK ✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Acknowledge potential customer		
2. Ask questions of customer to determine needs		
3. Take customer to location of wanted merchandise		
4. Select merchandise from various price lines to allow customer choice		
5. Describe benefits of merchandise to customer		
6. Put merchandise in customer's hands		
7. Suggest additional merchandise to increase amount of sale		
8. Package merchandise for customer		
9. Thank customer by name		
10. Compliment customer on selection of merchandise		
11. Suggest alternate places to purchase merchandise not carried by your store		
12. Read prices on merchandise		
13. Read classifying information from price tickets		
14. Ring cash register		
15. Count money taken from customer		
16. Count money returned to customer		
17. Add and subtract numbers		
18. Compute percentages		
19. Follow company policy on purchases by check and credit card(s)		

SUPERVISOR/MANAGER---TASK INVENTORY

Carefully read each of the TASK STATEMENTS and place a check mark (✓) in the column labeled "Check" for each task which you perform on your present job. After checking all tasks which you perform, then rate only the task you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which closely estimates the amount of time you spend in performing the task.

U. PRODUCT KNOWLEDGE	✓ IF DONE	TIME SPENT 1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Look at merchandise you are selling		
2. Hold and feel merchandise to determine quality and amount of workmanship		
3. Examine merchandise for quality and amount of workmanship		
4. Read tags and labels for manufacturer's name		
5. Read tags and labels for care of merchandise		
6. Make comparisons with other merchandise		
7. Determine what merchandise has to offer		
8. Demonstrate uses of merchandise		
9. Interpret the features of a product in terms of benefits to the customer		
10. Analyze products in relation to current trends (such as fashion, style, innovations)		
11. Explain service guarantees to customers		
12. Explain warrantees to customers		
13. Interpret directions for customers		

SUPERVISOR/MANAGER---TASK INVENTORY

Listed below are a duty and the task which it includes. Check all tasks which you perform. Add any tasks you do which are not listed. Then rate only the tasks you have checked by placing a number 1, 2, 3, 4, 5, 6, or 7, in the column labeled Time Spent which most closely estimates the amount of time you spend in performing the task.

V. CLOSING PROCEDURES/CUSTOMER RETURNS	CHECK	TIME SPENT
	✓ IF DONE	1. Very Much Below Average 2. Below Average 3. Slightly Below Average 4. About Average 5. Slightly Above Average 6. Above Average 7. Very Much Above Average
1. Gather price tickets from the day's business		
2. Gather saleschecks from the day's business		
3. Count receipts for day		
4. Prepare deposit of day's receipts		
5. Follow store procedures for closing registers		
6. Follow store policy for returns		
7. Treat customer with return courteously		
8. Examine returned merchandise for damage		
9. Suggest alternate merchandise to customer		
10. Repair damaged merchandise for customer when possible		
11. Determine the amount to be credited on return		
12. Return damaged merchandise to manufacturer when defective		

APPENDIX I

EDIT RUN OF SPSS (STATISTICAL PACKAGE FOR SOCIAL SCIENCES) PROGRAM USED FOR DISPLAY/BUYING/SALES OCCUPATIONAL CLUSTER

```
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START
START  JOB 1166  TASKS  2569  NAKAMAEJO   10.06.39PM 11 AUG 78  PRINTER1 ASTO.F  TASKS  2569  JOB 1166  START

                                   J E S 2   J O B   L O G

22.06.22 JOB 1166  $HASP373 TASKS     STARTED - INIT  1 - CLASS A - SYS K158
22.06.37 JOB 1166  **UHCC190I ENDED JOB TASKS     #2569  0000      3.717  1787     07
22.06.37 JOB 1166  $HASP395 TASKS     ENDED

      1     //TASKS    JOB (2569,30S,2250,1,9KL),'NAKAMAEJO',CLASS=A,MSGLEVEL=(1,1)  JOB 1166
      2     // EXEC SPSS
      3     XXSPSS    PROC  VERSION=SPSS,RG=220K,                                      00000100
            XX              GET=NULLFILE,                                              00000200
            XX              RAWDATA=NULLFILE,                                          00000300
            XX              SAVE=NULLFILE,                                             00000400
            XX              SAVEDSP='(NEW,CATLG,DELETE)',                              00000500
            XX              SPACE='20,5',                                              00000600
            XX              UNIT=USERDA                                                00000700
      4     XXGO       EXEC  PGM=&VERSION,REGION=&RG                                   00000800
      5     XXSTEPLIB  DD    DSN=SYS1.SPSSH.V7,DISP=SHR                                00000900
      6     XXFT01F001 DD    UNIT=SYSDA,SPACE=(CYL,(2,1))                              00001000
      7     XXFT02F001 DD    UNIT=SYSDA,SPACE=(CYL,(4,1))                              00001100
      8     XXFT03F001 DD    DISP=SHR,DSN=&GET                                         00001200
      9     XXFT04F001 DD    DSN=&SAVE,DISP=&SAVEDSP,UNIT=&UNIT,                       00001300
            XX             DCB=BLKSIZE=2012,SPACE=(TRK,(&SPACE),RLSE)                  00001400
     10     XXFT05F001 DD    DDNAME=SYSIN                                              00001500
     11     XXFT06F001 DD    SYSOUT=A                                                  00001600
     12     //FT08F001 DD *
            X/FT08F001 DD    DISP=SHR,DSN=&RAWDATA                                     00001700
     13     XXFT10F001 DD    DSN=T004580.SPSSUDC7,DISP=SHR                             00001800
     14     //SYSIN DD *
            //

 STMT NO. MESSAGE

      4     IEF653I SUBSTITUTION JCL - PGM=SPSS,REGION=220K
      8     IEF653I SUBSTITUTION JCL - DISP=SHR,DSN=NULLFILE
      9     IEF653I SUBSTITUTION JCL - DSN=NULLFILE,DISP=(NEW,CATLG,DELETE),UNIT=USERDA,
      9     IEF653I SUBSTITUTION JCL - DCB=BLKSIZE=2012,SPACE=(TRK,(20,5),RLSE)
     12     IEF653I SUBSTITUTION JCL - DISP=SHR,DSN=NULLFILE
IEF236I ALLOC. FOR TASKS GO
IEF237I 434  ALLOCATED TO STEPLIB
IEF237I 252  ALLOCATED TO FT01F001
IEF237I 152  ALLOCATED TO FT02F001
IEF237I DMY  ALLOCATED TO FT03F001
IEF237I DMY  ALLOCATED TO FT04F001
IEF237I JES2 ALLOCATED TO FT05F001
IEF237I JES2 ALLOCATED TO FT06F001
IEF237I JES2 ALLOCATED TO FT08F001
IEF237I 236  ALLOCATED TO FT10F001
IEF237I 154  ALLOCATED TO SYS00374
IEF142I TASKS GO - STEP WAS EXECUTED - COND CODE 0000
IEF285I   SYS1.SPSSH.V7                                     KEPT
IEF285I   VOL SER NOS= UHSYS4.
IEF285I   SYS78223.T220622.RA000.TASKS.R0000001             DELETED
IEF285I   VOL SER NOS= UHSYS2.
IEF285I   SYS78223.T220622.RA000.TASKS.R0000002             DELETED
IEF285I   VOL SER NOS= UHSYS5.
IEF285I   JES2.JOB01166.SI0102                              SYSIN
IEF285I   JES2.JOB01166.SO0103                              SYSOUT
IEF285I   JES2.JOB01166.SI0101                              SYSIN
IEF285I   T004580.SPSSUDC7                                  KEPT
IEF285I   VOL SER NOS= UHTS02.
IEF285I   SYSCTLG.VUHTS01                                   KEPT
IEF285I   VOL SER NOS= UHTS01.
*UHCC050I------------------------- J O B   P A R A M E T E R S ---------------------------*
*   ACCT#    |    CPU TIME  |  IO REQUESTS|    LINES    |    CARDS    |    FORMS    |    COPIES    *
*   2569     |       335    |    2250     |    9216     |    1000     |     STD     |       1      *
*-----------------------------------------------------------------------------------------------*
UHCC130I DDN=FT10F001-IO=       4-236-UHTS02-T004580.SPSSUDC7
UHCC130I DDN=FT01F001-IO=     149-252-UHSYS2-SYS78223.T220622.RA000.TASKS.R0000001
UHCC303I STP-  1 PGM=SPSS       T=78223/22:06-22:06       3.29TCBT     .425RUT    1780IC     0TIC   1855I   42250 200KB 200KT
$UHCC180I ------------------------- A C C O U N T I N G   I N F O R M A T I O N ------------------------------$
$ ACCT #  | JOB NAME | PROGRAMMER                     |   DATE    |  TIME ON  |  TIME OFF  |  MACHINE  |  OPERATING SYSTEM  $
$ 2569    | TASKS    | NAKAMAEJO                      | 8/11/78   | 22.06.23  |  22.06.38  |  370/158  |   MVS 3.7 / JES2   $
$-------------------------------------------------------------------------------------------------------------------$
$ STEP   C/C    STEP     PGM      CPU                    DISK      TAPE     SYSIN                  STORAGE    K-BYTE   $
$        CODE   NAME     NAME     TIME                   I/O       I/O      SYSOUT                 USED       * SECS   $
$                                                                                                                      $
$   1    0000   GO       SPSS     3.715                  170       0        607                    220K       846      $
$******************************************************************************************************************$
$        JOB TOTALS               3.715                  170       0        607                               846      $
$------------------------------------------------------------------------------------------------------------------$
$ MO. - CPU + (DISK I/O X .00305) + (TAPE I/O X .01154) + (K-BYTE SECS X .000861 $      8.1
                                                                          08/11/78          PAGE     1
STICAL PACKAGE FOR THE SOCIAL SCIENCES

FOR OS/360, VERSION H, RELEASE 7.2            DECEMBER 5, 1977

LT SPACE ALLOCATION..       ALLOWS FOR..      100 TRANSFORMATIONS
PACE       70000 BYTES                        400 RECODE VALUES + LAG VARIABLES
PACE       10000 BYTES                       1000 IF/COMPUTE OPERATIONS

               EDIT
               RUN NAME         TASK INVENTORY DISPLAY BUYING SALES
               VARIABLE LIST    ID, CARD1, TITLE, BUSINESS, ACADEMIC, EMPLOYED,
                                HOURWORK, YRSWORK, YRSMM, SALARY, A1 TO A13, B1 TO B19,
                                C1 TO C6, D1 TO D9, E1 TO E9, ID2, CARD2, F1 TO F25,
                                G1 TO G19, H1 TO H13, I1 TO I12, J1 TO J8
               INPUT MEDIUM     DISK
               INPUT FORMAT     FIXED (F3.0,6F1.0,3F2.0,13F1.0,19F1.0,6F1.0,9F1.0,9F1.0/
                                      F3.0,26F1.0,19F1.0,13F1.0,12F1.0,8F1.0)

               ACCORDING TO YOUR INPUT FORMAT, VARIABLES ARE TO BE READ AS FOLLOWS

               VARIABLE  FORMAT  RECORD    COLUMNS

               ID        F 3. 0      1       1-   3
               CARD1     F 1. 0      1       4-   4
               TITLE     F 1. 0      1       5-   5
               BUSINESS  F 1. 0      1       6-   6
               ACADEMIC  F 1. 0      1       7-   7
               EMPLOYED  F 1. 0      1       8-   8
               HOURWORK  F 1. 0      1       9-   9
               YRSWORK   F 2. 0      1      10-  11
               YRSMM     F 2. 0      1      12-  13
               SALARY    F 2. 0      1      14-  15
               A1        F 1. 0      1      16-  16
               A2        F 1. 0      1      17-  17
               A3        F 1. 0      1      18-  18
               A4        F 1. 0      1      19-  19
               A5        F 1. 0      1      20-  20
               A6        F 1. 0      1      21-  21
               A7        F 1. 0      1      22-  22
               A8        F 1. 0      1      23-  23
               A9        F 1. 0      1      24-  24
               A10       F 1. 0      1      25-  25
               A11       F 1. 0      1      26-  26
               A12       F 1. 0      1      27-  27
               A13       F 1. 0      1      28-  28
               B1        F 1. 0      1      29-  29
               B2        F 1. 0      1      30-  30
               B3        F 1. 0      1      31-  31
```

```
                                                                                08/11/78          PAGE      2
TASK INVENTORY DISPLAY BUYING SALES

                  ACCORDING TO YOUR INPUT FORMAT, VARIABLES ARE TO BE READ AS FOLLOWS

                  VARIABLE  FORMAT  RECORD   COLUMNS

                  B4        F 1. 0       1    32-  32
                  B5        F 1. 0       1    33-  33
                  B6        F 1. 0       1    34-  34
                  B7        F 1. 0       1    35-  35
                  B8        F 1. 0       1    36-  36
                  B9        F 1. 0       1    37-  37
                  B10       F 1. 0       1    38-  38
                  B11       F 1. 0       1    39-  39
                  B12       F 1. 0       1    40-  40
                  B13       F 1. 0       1    41-  41
                  B14       F 1. 0       1    42-  42
                  B15       F 1. 0       1    43-  43
                  B16       F 1. 0       1    44-  44
                  B17       F 1. 0       1    45-  45
                  B18       F 1. 0       1    46-  46
                  B19       F 1. 0       1    47-  47
                  C1        F 1. 0       1    48-  48
                  C2        F 1. 0       1    49-  49
                  C3        F 1. 0       1    50-  50
                  C4        F 1. 0       1    51-  51
                  C5        F 1. 0       1    52-  52
                  C6        F 1. 0       1    53-  53
                  D1        F 1. 0       1    54-  54
                  D2        F 1. 0       1    55-  55
                  D3        F 1. 0       1    56-  56
                  D4        F 1. 0       1    57-  57
                  D5        F 1. 0       1    58-  58
                  D6        F 1. 0       1    59-  59
                  D7        F 1. 0       1    60-  60
                  D8        F 1. 0       1    61-  61
                  D9        F 1. 0       1    62-  62
                  E1        F 1. 0       1    63-  63
                  E2        F 1. 0       1    64-  64
                  E3        F 1. 0       1    65-  65
                  E4        F 1. 0       1    66-  66
                  E5        F 1. 0       1    67-  67
                  E6        F 1. 0       1    68-  68
                  E7        F 1. 0       1    69-  69
                  E8        F 1. 0       1    70-  70
                  E9        F 1. 0       1    71-  71
                  ID2       F 3. 0       2     1-   3
                  CARD2     F 1. 0       2     4-   4
```

```
                                                                                08/11/78          PAGE     3
ASK INVENTORY DISPLAY BUYING SALES

                    ACCORDING TO YOUR INPUT FORMAT, VARIABLES ARE TO BE READ AS FOLLOWS

                    VARIABLE  FORMAT   RECORD     COLUMNS

                    F1        F 1. 0         2     5-   5
                    F2        F 1. 0         2     6-   6
                    F3        F 1. 0         2     7-   7
                    F4        F 1. 0         2     8-   8
                    F5        F 1. 0         2     9-   9
                    F6        F 1. 0         2    10-  10
                    F7        F 1. 0         2    11-  11
                    F8        F 1. 0         2    12-  12
                    F9        F 1. 0         2    13-  13
                    F10       F 1. 0         2    14-  14
                    F11       F 1. 0         2    15-  15
                    F12       F 1. 0         2    16-  16
                    F13       F 1. 0         2    17-  17
                    F14       F 1. 0         2    18-  18
                    F15       F 1. 0         2    19-  19
                    F16       F 1. 0         2    20-  20
                    F17       F 1. 0         2    21-  21
                    F18       F 1. 0         2    22-  22
                    F19       F 1. 0         2    23-  23
                    F20       F 1. 0         2    24-  24
                    F21       F 1. 0         2    25-  25
                    F22       F 1. 0         2    26-  26
                    F23       F 1. 0         2    27-  27
                    F24       F 1. 0         2    28-  28
                    F25       F 1. 0         2    29-  29
                    G1        F 1. 0         2    30-  30
                    G2        F 1. 0         2    31-  31
                    G3        F 1. 0         2    32-  32
                    G4        F 1. 0         2    33-  33
                    G5        F 1. 0         2    34-  34
                    G6        F 1. 0         2    35-  35
                    G7        F 1. 0         2    36-  36
                    G8        F 1. 0         2    37-  37
                    G9        F 1. 0         2    38-  38
                    G10       F 1. 0         2    39-  39
                    G11       F 1. 0         2    40-  40
                    G12       F 1. 0         2    41-  41
                    G13       F 1. 0         2    42-  42
                    G14       F 1. 0         2    43-  43
                    G15       F 1. 0         2    44-  44
                    G16       F 1. 0         2    45-  45
                    G17       F 1. 0         2    46-  46
```

```
ASK INVENTORY DISPLAY BUYING SALES                                          08/11/78         PAGE    4

            ACCORDING TO YOUR INPUT FORMAT, VARIABLES ARE TO BE READ AS FOLLOWS

            VARIABLE  FORMAT  RECORD     COLUMNS

            G18        F 1. 0     2      47-  47
            G19        F 1. 0     2      48-  48
            H1         F 1. 0     2      49-  49
            H2         F 1. 0     2      50-  50
            H3         F 1. 0     2      51-  51
            H4         F 1. 0     2      52-  52
            H5         F 1. 0     2      53-  53
            H6         F 1. 0     2      54-  54
            H7         F 1. 0     2      55-  55
            H8         F 1. 0     2      56-  56
            H9         F 1. 0     2      57-  57
            H10        F 1. 0     2      58-  58
            H11        F 1. 0     2      59-  59
            H12        F 1. 0     2      60-  60
            H13        F 1. 0     2      61-  61
            I1         F 1. 0     2      62-  62
            I2         F 1. 0     2      63-  63
            I3         F 1. 0     2      64-  64
            I4         F 1. 0     2      65-  65
            I5         F 1. 0     2      66-  66
            I6         F 1. 0     2      67-  67
            I7         F 1. 0     2      68-  68
            I8         F 1. 0     2      69-  69
            I9         F 1. 0     2      70-  70
            I10        F 1. 0     2      71-  71
            I11        F 1. 0     2      72-  72
            I12        F 1. 0     2      73-  73
            J1         F 1. 0     2      74-  74
            J2         F 1. 0     2      75-  75
            J3         F 1. 0     2      76-  76
            J4         F 1. 0     2      77-  77
            J5         F 1. 0     2      78-  78
            J6         F 1. 0     2      79-  79
            J7         F 1. 0     2      80-  80
            J8         F 1. 0     2      81-  81

 INPUT FORMAT PROVIDES FOR 145 VARIABLES.  145 WILL BE READ
PROVIDES FOR  2 RECORDS ('CARDS') PER CASE.  A MAXIMUM OF   81 'COLUMNS' ARE USED ON A RECORD.

            N OF CASES        UNKNOWN
            RECODE            TITLE TO E9, F1 TO J8 (BLANK=-1)/
            VAR LABELS        TITLE    CHECK YOUR PRESENT JOB TITLE                 /
                              BUSINESS CHECK TYPE OF BUSINESS PRESENTLY WORK        /
                              ACADEMIC HIGHEST ACADEMIC LEVEL ACHIEVED              /
                              EMPLOYED EMPLOYED FULL TIME IN PRESENT POSITION       /
                              HOURWORK IF PART TIME HOW MANY HOURS PER WEEK         /
                              YRSWORK  HOW MANY YRS WORKED AT PRESENT JOB           /
                              YRSMM    HOW MANY YRS WORKED MKT MERCH FIELD          /
```

```
SALARY   PRESENT YEARLY SALARY FULL TIME EMPLYMNT/
A1       ANALYZE CUSTOMER TRAFFICE PATTERNS      /
A2       DETERMINE MERCHANDISE LAYOUT            /
A3       DECIDE TYPES OF MERCH FIXTURES REQUIRED /
A4       DECIDE TYPES OF DISPLAYS NEEDED         /
A5       PLAN FOR SEASONAL DISPLAYS              /
A6       DETERMINE NEED FOR MERCHANDISE DISPLAYS /
A7       DECIDE ON TIE-IN ITEMS FOR DISPLAY      /
A8       DETERMINE SPACE REQUIRE SEASONAL DISPLAY/
A9       SELECT LOCATION FOR SEASONAL DISPLAYS   /
A10      SELECT LOCATION OF IMPULSE DISPLAYS     /
A11      ORIGINATE DISPLAY IDEAS                 /
A12      SELECT LOCATION FOR NEW ITEMS           /
A13      COORDINATE DSPLY WTH OTHR FORMS OF PROMO/
B1       GROUP RELATED MERCHANDISE               /
B2       SET UP MAJOR DISPLAYS                   /
B3       SUPERVISE SETTING UP OF DISPLAYS        /
B4       SUPERVISE SETTNG UP SEASNL MERCH DISPLAY/
B5       CONSTRUCT PROPS USING HANDTOOLS         /
B6       ARRANGE PROPS                           /
B7       ARRANGE MANNEQUINS TO DISPLAY MERCHNDSE /
B8       ARRANGE FURNITURE TO DISPLAY MERCHNDISE /
B9       ARRANGE BACKDROP TO DISPLAY MERCHANDISE /
B10      ASSMBL PREFAB DSPLY PROPS WOOD HND TOOLS/
B11      ASSMBL PREFAB DSPLY PROPS FABRCS HND TLS/
B12      ASSMBL PREFAB DSPLY PROPS GLASS HND TOLS/
B13      ASSMBL PREFAB DSPLY PROPS PAPER HND TOLS/
B14      ASSMBL PREFAB DSPLY PROPS PLSTIC HND TOOL/
B15      PLACE PRICE SIGNS IN DISPLAYS           /
B16      PLACE DESCRIPTIVE SIGNS IN DISPLAYS     /
B17      PHASE OUT SEASONAL DISPLAYS             /
B18      DISMANTLE OLD DISPLAYS                  /
B19      LETTER SHOW CARDS FOR DISPLAY           /
C1       SUPERVISE STRAIGHTENING OF MERCHANDISE  /
C2       POST SIGNS                              /
C3       MAINTAIN SHELF LAYOUT                   /
C4       MAINTAIN SHELF RACK ALIGNMENT           /
C5       ROTATE STOCK                            /
C6       EFFECTVLY USE POS MATRIL SUPPLD BY MANUF/
D1       SELECT ORDER MERCH OFFRD BY MANUF REP   /
D2       FORECAST SEASONAL MERCHANDISE NEEDS     /
D3       REVIEW PAST SALES RECORDS               /
D4       PLACE ORDERS WITH SOURCE                /
D5       WRITE PROMOTIONAL ORDERS                /
D6       SELECT ITEMS LINES TO BE STOCKED        /
D7       DETERMINE BASIC STOCK LEVELS            /
D8       AUTHORIZE PAYMNTS TO SUPPLIERS VENDORS  /
D9       CONDCT STFF METNG WTH SALES PERSNNL     /
E1       MAINTAIN CURRENT PRICE BOOK             /
E2       MAKE REQUIRED PRICE CHANGES             /
E3       ENTER PRICE CHANGES IN BOOK             /
E4       SUPERVISE PRICE MARKING                 /
E5       CHECK MERCHANDISE FOR ACCURATE PRICING  /
E6       KEEP PRICE CHANGES CURRENT              /
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ASK INVENTORY DISPLAY BUYING SALES
              E7   GV INFO MRKRS ON PRICE MRK UP PRNT TCKTS/
              E8   GV INFO MRKRS ON PRCE MRK DWN PRNT TCKTS/
              E9   GV INFO MRKRS MANF NUM SEAS CO STYL NUM /
              F1   MATINTAIN PROPER STOCK TO SALES RATIO   /
              F2   MATINTAIN BALANCE STOCK ASSORTMENTS     /
              F3   RETURN DAMAGED MERCHANDISE FOR CREDIT   /
              F4   ANALYZE OVERSTOCKS                      /
              F5   CLEAR OUT EXESS OVERSTOCKS              /
              F6   ANALYZE UNDERSTOCK CONDITIONS           /
              F7   MAINTAIN STOCKROOM INVENTORY LEVEL      /
              F8   CLEAR OUT DISCONTINUED MERCHANDISE      /
              F9   MAINTAIN ACCURATE SHELF PRICE TAGS      /
              F10  CORRECT MISPRICED MERCHANDISE           /
              F11  ALLOCATE MERCHANDISE TO BRANCH STORES   /
              F12  VERFY QUANTTY INCMNG MERCH AGNST INVOICE/
              F13  VERIFY QUALITY OF STOCK RECEIVED        /
              F14  INSPECT EXCHANGED OR REFUNDED MERCHNDSE/
              F15  LIQUIDATE OUTDATED MERCHANDISE          /
              F16  LIQUIDATE DAMAGED MERCHANDISE           /
              F17  LIQUIDATE UNSOLD SEASONAL MERCHANDISE   /
              F18  DETERMINE STOCKING SCHEDULE             /
              F19  DETERMINE REQUIRED MANHOURS TO STOCK    /
              F20  SCHEDULE FLOOR STOCKING                 /
              F21  INSURE CORRECT STOCKING METHODS ARE USED/
              F22  SUPERVISE STOCKING                      /
              F23  CLEAN AND DUST MERCHANDISE              /
              F24  CLEAN AND DUST FIXTURES HOLDING MERCH   /
              F25  REPORT DAMAGED MERCHANDISE FIXTURES     /
              G1   ACKNOWLEDGE POTENTIAL CUSTOMER          /
              G2   ASK QUESTNS OF CUSTOMERS TO DTERMNE NEED/
              G3   TK CUSTMRS TO LOCTN OF WANTD MERCHANDISE/
              G4   SLCT MERCH FRM VARS PRC LNS ALLW CUS CHC/
              G5   DESCRIBE BENEFITS OF MERC TO CUSTOMER   /
              G6   PUT MERCH IN CUSTOMERS HANDS            /
              G7   SUGGST ADDTNL MERCH TO INCRS AMT OF SALE/
              G8   PACKAGE MERCHANDISE FOR CUSTOMER        /
              G9   THANK CUSTOMER BY NAME .                /
              G10  COMPLIMNT CUSTOMER ON SELECTION OF MERCH /
              G11  SUGGST ALTER PLCS PURCH MERCH NT CRD STR/
              G12  READ PRICES ON MERCHANDISE              /
              G13  READ CLASSIFYING INFO FRM PRICE TICKETS /
              G14  RING CASH REGISTER                      /
              G15  COUNT MONEY TAKEN FROM CUSTOMER         /
              G16  COUNT MONEY RETURNED TO CUSTOMER        /
              G17  ADD AND SUBTRACT NUMBERS                /
              G18  COMPUTE PERCENTAGES                     /
              G19  FLLW COMP PLCY PURCH BY CHCK AND CRDT CD/
              H1   LOOK AT MERCHANDISE YOU ARE SELLING     /
              H2   HLD FEEL MERCH DTRMN QUAL AMT OF WRKMNS /
              H3   EXMN MERCH QUALTY AND AMT OF WORKMNSHIP /
              H4   READ TAGS LABELS MANUFACTURERS NAME     /
              H5   READ TAGS LABELS FOR CARE OF MERCHANDISE/
              H6   MAKE COMPARISONS WITH OTHER MERCHANDISE /
              H7   DETERMINE WHAT MERCHANDISE HAS TO OFFER /
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ASK INVENTORY DISPLAY BUYING SALES                                         08/11/78          PAGE    7
                                H8          DEMONSTRATE USES OF MERCHANDISE            /
                                H9          INTRPRT FEATR PROD TERMS BENEF TO CUSTO /
                                H10         ANALYZE PROD RELATION TO CURRENT TRENDS /
                                H11         EXPLAIN SERVICE GUARANTEES TO CUSTOMERS /
                                H12         EXPLAIN WARRANTEES TO CUSTOMERS            /
                                H13         INTERPRET DIRECTIONS FOR CUSTOMERS         /
                                I1          GATHER PRICE TICKETS FRM DAYS BUSINESS   /
                                I2          GATHER SALESCHECKS FRM DAYS BUSINESS       /
                                I3          COUNT RECEIPTS FOR DAY                     /
                                I4          PREPARE DEPOSIT OF DAYS RECEIPTS           /
                                I5          FOLLW STORE PROCEDURES CLOSING REGISTERS/
                                I6          FOLLOW STORE POLICY FOR RETURNS            /
                                I7          TREAT CUSTOMER WITH RETURN COURTEOUSLY  /
                                I8          EXAMINE RETURNED MERCHANDISE FOR DAMAGE /
                                I9          SUGGST ALTERNATE MERCHANDISE TO CUSTOMER/
                                I10         REPAIR DAMGD MERCH CUSTOMR WHN POSSIBLE /
                                I11         DETERMINE AMT TO BE CREDITED ON RETURN  /
                                I12         RETRN DAMGD MERCH MANUFCT WHN DEFECTIVE /
                                J1          ESTABLISH BUCK CUSTOMR NAMES ADDRESSES   /
                                J2          CALL CUSTOMERS ABOUT SPECIAL SALES         /
                                J3          CALL CUSTOMERS ABT ARRVL OF NEW MERCHNDS/
                                J4          COMPILE LIST OF STORE CUSTOMER SERVICES /
                                J5          VERIFY LOCATN OF MERCH IN YOUR STORE     /
                                J6          CONSULT NEWSPPR ADVRTSC ITMS STR COMPETI/
                                J7          SUGGST OPENNG STR CHRG ACCT WHN APPLCBL /
                                J8          INFRM CUSTO ARRVL DT MERCH PRSNT OUT STK/
                VALUE LABELS    TITLE (1) DISPLAY (2) DISPLAY PERSON
                                     (3) DISPLAY TRIMMER (4) BUYER (5) ASSTNT BUYER
                                     (6) BUYERS CLERICAL (7) SALESPERSON (8) OTHER       /
                                BUSINESS (1) APPRL ACCS MERCH (2) GEN MERCH (3) WHLSE
                                         (4) MANUFACTURING (5) OTHER                     /
                                ACADEMIC (1) < THAN H S DIP (2) H S DIP OR EQUIV
                                         (3) SOME COLLEGE (4) ASSOCIATE DEGREE
                                         (5) BACHELORS (6) MASTERS                       /
                                EMPLOYED (1) YES (2) NO                                  /
                                HOURWORK (1) < THAN 15 (2) 15 TO 20 HOURS
                                         (3) 20 TO 30 HOURS (4) 30 TO 35 HOURS           /
                                SALARY (1) < THAN $5000 (2) $5000 TO $6999
                                       (3) $7000 TO $7999 (4) $8000 TO $8999
                                       (5) $9000 TO $9999 (6) $10000 TO $10999
                                       (7) $11000 TO $11999 (8) $12000 TO $12999
                                       (9) $13000 TO $15000 (10) > THAN $15000           /
                                A1 TO E9, F1 TO J8 (1) VRY MCH BLOW AVE
                                (2) BELOW AVERAGE (3) SLGHTLY BLOW AVE (4) ABOUT AVERAGE
                                (5) SLGHTLY ADV AVE (6) ABOVE AVERAGE
                                (7) VRY MCH ADV AVE                                      /
                                TITLE TO E9, F1 TO J8 (-1) NO RESPONSE                   /
                MISSING VALUES  ALL (-1)
                FREQUENCIES     INTEGER=TITLE(-1,8) BUSINESS(-1,5) ACADEMICS (-1,6)
                                       EMPLOYED(-1,2) HOURWORK(-1,4) SALARY(-1,10)       /
                OPTIONS         8
                STATISTICS      ALL

FREQUENCIES . PROBLEM REQUIRES     432 BYTES OF SPACE
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SK INVENTORY DISPLAY BUYING SALES                                      08/11/78       PAGE      8

ANSPACE REQUIRED..        100 BYTES
     1 TRANSFORMATIONS
     2 RECODE VALUES + LAG VARIABLES
     0 IF/COMPUTE OPERATIONS
                    READ INPUT DATA
                    FREQUENCIES      INTEGER=YRSWORK, YRSMM(-1,99)
                    OPTIONS          7
                    STATISTICS       ALL

REQUENCIES' PROBLEM REQUIRES     812 BYTES OF SPACE

                    FREQUENCIES      INTEGER=A1 TO E9, F1 TO J8(-1,7)
                    STATISTICS       ALL

REQUENCIES' PROBLEM REQUIRES    4972 BYTES OF SPACE

                    FINISH

          NORMAL END OF JOB.
            185 CONTROL CARDS WERE PROCESSED.
              0 ERRORS WERE DETECTED.
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